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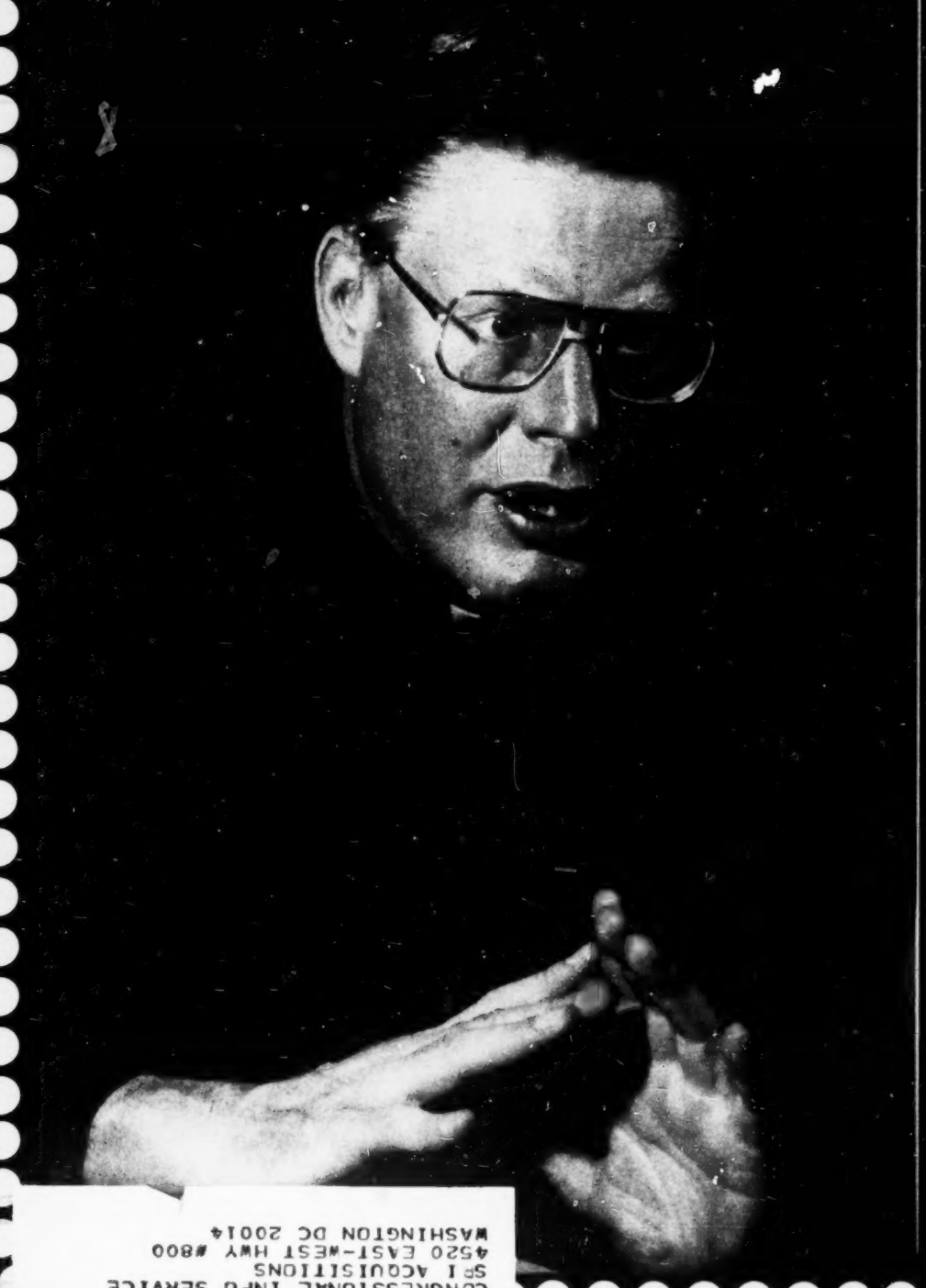
Advertising Age Thursday

INSIDE:

- Brady on Iacocca vs. Japan
- Marketing to Hispanics —the top 10 markets



Prime time for Beverly Hills priest

'My challenge is to create shows that will pull a mass audience,' says Father Bud Kieser, producer of 'The Fourth Wise Man.'

AA
DC20014CONGLI FMJF M
CONGRESSIONAL INFO SERVICE
SP1 ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

In the news

GE turns on a new sound

General Electric's new advertising for its line of youth-oriented audio products fights the marketer's stodgy image. "These kids simply didn't want to buy a radio from someone who makes refrigerators and light bulbs," said Richard Costello, GE's manager-marketing communications for consumer electronics. *See Page 4.*

Cover photo: Susan Bowser

The gospel according to Bud

To Father Ellwood Kieser—"my friends call me Bud"—the road into Hollywood studios was a natural outgrowth from the path a group of ad agency people steered him toward 25 years ago in Los Angeles when Father Kieser began looking for a mass medium and found it in tv. From that initial effort, which he jokingly refers to today as 28 minutes of "God-talk and platitudes" with a magnetic chalkboard, the 55-year-old Paulist priest has landed in prime time. *See Page 5.*

The taxman may cometh

A California congressman is dusting off legislation that would bar alcoholic-beverage marketers from deducting ad costs as a business expense. "This is our way of saying that alcohol is a dangerous substance, but it's not as harmful as other legislation, such as a ban," said an aide to Rep. George Brown. *See Page 50.*

Special Report

Marketing to Hispanics

Sixty-two per cent of U.S. Hispanics live in the top 10 Hispanic markets. Understanding these people is the key to grasping the whole Hispanic market, and Special Report provides a starting point for analyzing those 10 cities and their residents. *Beginning on Page 13.*

Cap Cities buy signals future for networks

By Craig Reiss

Cable tv was expected to do it, but that medium could only bruise network tv. It hasn't yet drawn blood.

Syndication was supposed to do it, yet advertisers still await the emergence of a legitimate fourth network—and network tv continues to report record financial results.

But with two short weekends of negotiations and a check for $3.5 billion, Capital Cities Communications has accomplished what all previous efforts had fallen short of doing: The Cap Cities buyout of ABC Inc. serves notice that network tv no longer can remain an untouchable corporate institution in America.

Start of new chapter

Cap Cities' bold move represents the start of a new chapter in U.S. tv history.

It is the prolog. The face of tv ownership, management and direction can be expected to change beyond ABC. An industry that for years resisted the notion that the rules of the tv game were being rewritten now finds its management independence for sale. Forces far removed from prime time ratings and segmentation of audience have brought forth this change. Cap Cities' motives for the merger were explained more in terms of undervalued stock prices than underdelivery of audience. It is not a brush fire easily contained.

Sources at Capital Cities said the company moved so swiftly to acquire ABC Inc. because it feared it could soon face a takeover bid, perhaps from American Express, part owner of Warner Amex Cable Communications. An American Express spokesperson called the idea "ludicrous," but that's what they were saying inside Cap Cities.

For ABC's part, the decision to sell reportedly was an admission that some company was bound to buy it out, and Capital Cities was the most desirable choice.

Smaller gobbles larger

The most salient factor in the merger was the fact that the smaller of the two parties acquired the larger in this $3.5 billion deal. Cynics who had dismissed the reported bid by Ted Turner to take over CBS Inc. because of the disparity in financial size between the two companies now must be taking a second look.

The explanation of how Cap Cities could acquire the much larger ABC Inc. lies in both companies' bottom lines. ABC Inc. last year had revenues of $3.7 billion (up 26% compared with '83) and net earnings of $195 million (up 22%). Cap Cities had revenues of $949.7 million in '84 (up 23%), with net earnings of $135.2 million (up 18%). It simply costs Cap Cities less money to make more money.

Cap Cities' management philosophy in one major respect is not so different from that of Mr. Turner. For years, Mr. Turner has predicted that the survivors in tv will be the companies that are managed most efficiently.

Cap Cities believes that to be true. It is only the style and experience of Cap Cities' top management that makes it a more desirable acquirer than the outspoken and brash Mr. Turner.

The management pecking order of the merged company clearly points up that Cap Cities is the acquirer and is in control. Thomas Murphy, chairman-ceo of Capital Cities, holds the same titles in Cap Cities/ABC. Daniel Burke, president-coo of Cap Cities, takes those titles to the merged company as well. Reporting to Mr. Burke will be Frederick Pierce, who had been president of ABC Inc. and now becomes chairman-ceo of the ABC unit. Leonard Goldenson, formerly chairman of ABC Inc., becomes chairman of Capital Cities/ABC Inc.'s executive committee.

L. Goldenson

T. Murphy

Murphy in charge

Mr. Murphy now becomes the ultimate ruler of the merged company. The man who started as an executive at Lever Bros. in the 1950s has remained a relative unknown entity in broadcasting, even though Capital Cities before the merger was the 16th-largest media company in the U.S. He is known for his low-key style, his management skills and his penchant for small staffs and big financial returns on operations.

In its New York headquarters, Capital Cities has a staff of 30 persons. ABC Inc. has considerably more people occupying executive suites at its Manhattan headquarters.

But will Cap Cities be able to effect the kinds of management streamlining and cost-cutting necessary to maintain its reputation for bare-bones investment and high returns? When a network is in third place in the ratings race, is it the most opportune time to approach the Hollywood production community with pleas for lower prices? It is difficult to see Hollywood's motivation to cooperate in the short term. Such a strategy by the new communications company will, no doubt, require very skillful maneuvering.

The merger also comes on the heels of management restructuring at ABC Broadcast Group and ABC Television (AA, March 18).

While it is not expected that Cap Cities will immediately reverse those changes (which demoted former ABC-TV president John Severino and placed absolute power for turning around the ratings in the hands of ABC Broadcast Group president Anthony Thomopoulos and ABC Entertainment president Lewis Erlicht), the old alliances at ABC that led to the reformulated structure now must answer to a new, higher authority. It is this

(Continued on Page 51)

Presstime

Luisi wins libel round

NEW YORK—Marie Luisi has won the right to sue J. Walter Thompson USA and JWT Group chairman Don Johnston for libel. Ms. Luisi, formerly head of JWT's spot tv and syndication unit, was fired following a $30 million time banking scandal in 1982 (AA, Feb. 8, '82, *et seq.*). Statements contained in a March 30, 1982, press release distributed by JWT showed sufficient cause to be tried for libel, said New York state supreme court Judge David Saxe. The judge waived the requirement that Ms. Luisi demonstrate "special damages" from the press release, a requirement in most libel cases. The case now goes to the discovery procedure. Libel charges were dismissed against JWT officials Robert Buchanan, Herbert Eames Jr., Victor Gutierrez and Burt Manning.

Tyco shops for new agency

MORRISTOWN, N.J.—Tyco Industries is opening its $6 million account for review. The $70 million toy marketer has fired Scott Lancaster Mills Atha, Los Angeles, after a 10-year relationship. The agency was let go because Tyco has "expanded beyond its traditional business and requires an agency to handle its new growth," said Tyco vp-advertising Robert Lurie. Agency ceo Steve Scott attributed the breakup to "sharp differences" about creative strategy.

A-B Cobra ready to strike

ST. LOUIS—Anheuser-Busch next week will spring into major markets with King Cobra premium malt liquor. It has been testing the brand for the last year. A-B settled on the King Cobra name after testing both it and the Jaguar name. J.P. Martin Associates, New York, handles.

AdCom bid stalling?

CHICAGO—Quaker Oats Co. may be starting to lose faith in AdCom president Gary Bayer's ability to finance his planned purchase of Quaker's in-house agency, a company insider said. The snag is over whether Quaker will guarantee Mr. Bayer and his investor group minimum billings from Quaker products or lower its asking price. Sources at New York agencies Backer & Spielvogel and BBDO say Quaker hasn't notified them that they're out of the race.

Guild writes off strike

HOLLYWOOD—Members of the Writers Guild of America have voted by more than a 2-to-1 margin to end their two-week strike. The action had hit NBC-TV the hardest of the Big 3 commercial networks, forcing some shows into reruns as production schedules jerked to a halt (AA, March 11, *et seq.*).

Chiat grabs Kelly Award

NEW YORK—Chiat/Day, Los Angeles, won the 1984 Stephen E. Kelly Award from the Magazine Publishers Assn. March 19 for its Nike Apparel print ads. The fourth annual presentation of the award, for the year's best magazine advertising, was accompanied by a check for $25,000, to be shared by Lee Clow, Chiat creative director; Jeff Gorman, copywriter, and Gary Johns, art director. Chiat's Los Angeles and San Francisco offices had three of the 10 finalists.

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Touring the top 10

Greater L.A. Visitors Bureau

A city within a city

By Richard Mahler

"The Mexican-Americans of Los Angeles are lucky," wrote Truman Capote. "They have their own culture."

The remark—as much a put-down of nonethnic Angelenos as a positive statement about their Hispanic counterparts—provides important insight into this city within a city, culture within a culture.

A walk down Broadway, the main artery of the city's Spanish-speaking community, is almost the same as a stroll through Mexico City's *Zona Rosa*. Los Angeles now rivals the Mexican capital as the second largest Spanish-speaking city in the Northern Hemisphere and the eighth largest in the world.

For miles east of Broadway, a visitor may hear and read nothing but Spanish. Hundreds of thousands are born, grow old and die in East Los Angeles with Spanish their primary language and Mexico their cultural touchstone—80% are of Mexican descent.

The market may be shifting toward greater diversity, however. Those of Mexican descent now are more likely to have been born here, and many new arrivals are streaming in from other countries, primarily Caribbean and Central American nations, notably Guatemala and El Salvador.

"However, the movement is not in the classic melting pot sense," says Henry Adams-Esquivel, vp, Market Development, a transcultural research company based in San Diego. "The people are assimilating, but primarily to other Hispanics in their communities. In Los Angeles, the community of Mexicans is so enormous that the other nationalities skew their language, eating habits and life styles to the Mexican." They are not necessarily becoming more like the general population, he says, but more like each other.

This melting pot within a pot is getting larger each day. Public schools report more than 50% Hispanic enrollment in elementary grades, and demographers estimate the Hispanic population is growing 6.5% annually, five times the rate for the city as a whole. Possibly by the year 2000, the Hispanic minority is

(Continued on Page 18)

Richard Mahler is a frequent contributor to Special Report who reported on the growing influence of California's Asian population in last year's Special Report on California.

Los Angeles

Print

Title	Frequency
La Opinion	daily
La Prensa de Los Angeles	weekly
Belvedere Citizen	weekly
Caminos	monthly
City Terrace Comet	weekly
Eagle Rock Sentinel	2/wk
Eastside Journal	weekly
Eastside Sun	weekly
El Sereno Star	weekly
Ela Brooklyn - Belvedere Comet	weekly
Highland Pk. News Herald & Journal	weekly
Lincoln Heights Bulletin News	weekly
Mexican American Sun	weekly
Montebello Comet	weekly
Monterey Pk. Comet	weekly
Northeast Star Review	weekly
South Pasadena Journal	weekly
Wyvernwood Chronicle	weekly
East Los Angeles Tribune	weekly
Mr. TeVe	weekly
Q-vo	bimonthly
Noticias del Mundo	6 days

Radio

Call letters	Spanish-language hours/wk
KPFK - FM	4
KLVE - FM	168
KTNQ - AM	168
KWKW - AM	168
KALI - AM	168
KCSN - FM	2
KMAX - FM	25
KPCC - FM	1
XEPRS - AM	168
KSKQ - AM	168
KXLU - FM	24

Television

Call letters	Spanish-language hours/wk
KMEX	)168
KSCI	45

Not just Spanish Harlem

By W. Franklyn Joseph

After more than 30 years in the industry, very little, if anything, that relates to the Hispanic market slips by Alicia M. Conill, president of New York-based Conill Advertising Associates. The ground has been covered and recovered so much lately that Ms. Conill says she is tired of seeing and reading statistical reports that identify the same aspects unique to the Hispanic community.

Nothing is new, she says, except an awakening by many advertisers to the Hispanic market's potential. Items that trumpet the behavioral patterns of the group such as strong family and religious ties as well as their brand loyalty are true, Ms. Conill says, but repetitious. Hispanics have charisma beyond the cold illusion of statistical charts, she says, and occasionally the human aspects are overlooked.

"The fascination of the Spanish market is that it is the only new market right now in the United States," says Pedro Font, president of Font & Vaamonde, a New York agency. Advertisers in search of new targets have realized the potential of the Hispanic market, he says.

"The key to unlocking the New York segment of the Hispanic market is to understand the composition of the market . . . and communicate a message to them, in their own language," Ms. Conill says.

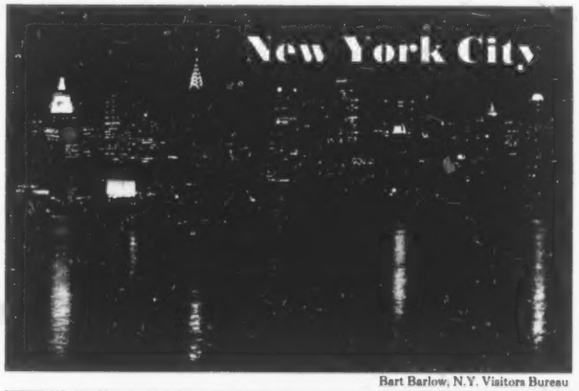
Ranked as the No. 2 U.S. Hispanic market in population, New York area Hispanics are concentrated in the city's five boroughs. The majority of Manhattan's Hispanics live in *El Barrio*—better known as "Spanish Harlem"—between the exclusive Manhattan high-rises and Harlem's black neighborhoods. The South Americans have picked Queens, the Cubans moved to New Jersey and the Puerto Ricans primarily have claimed the Bronx, says Mike Psaltis, vp, Adelante Advertising.

According to Strategy Research Corp., when neighboring counties in New York and New Jersey are included, the area's Hispanic population stands at 2.4 million, or 14% of the total U.S. Hispanic population. Puerto Ricans represent 60% of the market, followed by Dominicans and Cubans as the next most visible ethnic groups.

"When you take into consideration the amount of undocumented aliens who are in the

(Continued on Page 24)

W. Franklyn Joseph is executive editor of Class, *a New York-based publication targeted to Caribbean-Americans.*



Bart Barlow, N.Y. Visitors Bureau

New York

Print

Title	Frequency
Nuevo Amanecer	monthly
El Diario-La Prensa	6/wk
La Voz Hispania	weekly
El Tiempo de Nueva York	weekly
Noticias del Mundo	daily

Radio

Call letters	Spanish-language hours/day
WADO - AM	24
WBNX - AM	24
WJIT - AM	24
WSKQ - AM	24

Television

Call letters	Spanish-language hours/wk
WNJU	100
WXTV	126
WNBC	.5
WOR - TV	.5

Miami

Print

Title	Frequency
Diario de las Americas	6 days
El Miami Herald	daily
Bienvenidos a Miami	2/month
Miami Mensual	monthly
Replica	weekly
La Voz	2/month
Las Noticias de Hialeah	weekly
Vista	monthly
Donde	5/year

Radio

Call letters	Spanish-language hours/day
WCMQ - AM	24
WCMQ - FM	24
WRHC - AM	24
WOCN - AM	
WQBA - AM	24
WQBA - FM	24
WSUA - AM	24

Television

Call letters	Spanish-language hours/wk
WLTV	133
WPBT	3
HIT-TV (Cable)	168
WSCV	116.5

Turmoil joins affluence

By John F. Sugg

Meet Miami's Hispanic community:

Francisco de Borbon y Escasany, the honest-to-God duke of Seville; Andres Garcia Marrero, "El Loco," cop killer; Luis Botifoll, aristocratic chairman of the bank credited with financing much of Miami's Cuban business; Ray Corona, flamboyant chairman of the first bank ever accused of being purchased for the primary purpose of laundering money.

Meet Miami's Hispanic community:

Huber Matos, patriot who rotted for years in Fidel Castro's jails; Eduardo Arocena, convicted terrorist; the families of

(Continued on Page 28)

John Sugg, a former Ad Age *correspondent, is manager of the Miami division of the Communications Group.*

R. Valladares, ©The Image Bank

U.S. Hispanic markets

San Antonio

Print

Title	Frequency
La Voz de San Antonio	weekly
Southside Sun	weekly
Westside Sun	weekly
Visitante Dominical	weekly

Radio

Call letters	Spanish-language hours/day
KCOR - AM	24
KEDA - AM	24
KFHM - AM	12
KXET - FM	24

Television

Call letters	Spanish-language hours/wk
KWEX	126
SATV	92

S. A. Visitors Bureau

City has split personality

By Richard Erickson

Identifying and targeting the San Antonio, Tex., Hispanic audience is tough. In fact, it might be even more difficult than in most of the other major Hispanic cities.

"The reason this market is tougher," says Lionel Sosa, president-creative director of Sosa & Associates, "is that it has a little bit of a schizo personality in that most of the Hispanics in San Antonio are not newcomers to the United States. In fact, they are third and fourth-generation Hispanics and overwhelmingly bilingual, the Hispanics that carry the cultures and traditions of Mexico while becoming mainstream U.S.A."

Statistics tell part of the market's story. Strategy Research Corp., Miami, estimates the local Hispanic population at 781,800, 72% within San Antonio's Bexar County, and most of those people residing on the south and west sides of the city. The U.S. Census Bureau, which admits undercounting Hispanics by about 12%, projects the Bexar County Hispanic population at 565,400. The community generally is described as being 54% Hispanic.

Although Strategy Research pegged San Antonio as the nation's fourth largest Hispanic market in 1984, the Census Bureau dropped the city from the third largest in 1980 to seventh in 1985.

This did not happen because the population stopped growing

(Continued on Page 32)

Richard Erickson is editor of San Antonio Today.

S.F. Visitors Bureau

Refugees change district

By Lynn Berling-Manuel

The San Francisco Hispanic market is a puzzle with its pieces spread across hundreds of square miles and over many nationalities. Assembled, the pieces become the Hispanic market with one of the highest

(Continued on Page 38)

San Francisco

Print

Title	Frequency
El Mundo	weekly
El Tecolote	monthly
Tiempo Latino	weekly
La Prensa de San Francisco	n/a
El Bohemio	2/month

Radio

Call letters	Spanish-language hours/wk
KBRG - FM	168
KIQI - AM	84
KOFY - AM	84
KPOO - FM	12
KNTA	168
KAZA - AM	84

Television

Call letters	Spanish-language hours/wk
KDTV	140
KTVU	.5

Mary Cairns

Cross-section of nation

By Jack Hafferkamp

If an actress wanted to portray Hispanic Chicago, she could warm up with readings from "The Three Faces of Eve" or even "Sybil"—because Chicago's Hispanic community has multiple personalities.

The Windy City is at the crossroads of Hispanic North America. The Chicago area is not only the fifth largest U.S. Hispanic market with 741,000 people, according to Strategy Research Corp., Miami, but also the convergence of all the major Hispanic nationalities.

So to be accurate, the actress would have to play a Mexican-American 63% of the time, a Puerto Rican 22%, a Cuban 3% and then a series of characters from Spain to the Philippines, Tierra del Fuego to Guatemala the remaining 12% of the time.

You could say that makes Chicago one crazy woman. You also could say that if you can get a handle on her, you've gone a long way toward grasping the national Hispanic population. Chicago's Hispanic profile is uncannily similar to the national mix—with only 4% more Mexicans and 8% more Puerto Ricans, and 3% fewer Cubans and 8% fewer Central and South Americans.

Strategy Research says Chicago Hispanics are generally younger and less educated, but a bit more affluent than their national counterpart. Although scattered, culturally and geographically, over the 19-county Chicago area of dominant influence, about 85% of Illinois' Hispanics live in Cook County, making it the fourth largest Hispanic county in the U.S.

Community leaders estimate the actual population at more

(Continued on Page 36)

Jack Hafferkamp is a frequent contributor to Special Report living in Chicago.

Chicago

Print

Title	Frequency
El Heraldo de Chicago	weekly
El Manana Newspaper	6 days/wk
La Raza	weekly
Logan Square Extra	weekly
Northwest Extra	weekly
Wicker Park/ West Extra	weekly

Radio

Call letters	Spanish-language hours/wk
WEDC - AM	66.5
WSBC - AM	38
WOJO - FM	168
WONX - AM	77
WKKD - AM	6
WCEV - AM	20.5
WCRW - AM	34
WCYC - FM	36
WMBI - AM	12
WVVX - FM	33
WTAQ - AM	12.6

Television

Call letters	Spanish-language hours/wk
WCIU	33.5
WCFC	3
WBBS	56

Houston

Print

Title	Frequency
Revista Chicano-Riquena	4/yr
La Voz de Houston	weekly
El Sol	weekly
Informacion	2/month
El Mexica	weekly
El Mundo	weekly
Los Noticias de Fort Bend	weekly
Del Universal	weekly

Radio

Call letters	Spanish-language hours/day
KEYH - AM	12
KLAT - AM	24
KLVL - AM	24
KXYZ - AM	24
KFRD - AM	6
KYST - AM	24
KHCB - FM	2
KUHF - FM	7/wk
KXKX - FM	24

Television

Call letters	Spanish-language hours/day
K45AK	24

Integration, not isolation

By Richard Vara

Uncovering the average Houston-area Hispanic's profile is a task not unworthy of Sherlock Holmes. However, collecting the numerous clues and piecing together the substantial but scattered data could help garner a share of the Hispanic community's $1.3 billion income.

Even estimating the number of Hispanics in Harris County, which includes Houston and several suburbs, can stump a ta-

(Continued on Page 39)

Richard Vara is a reporter with the Houston Post.

James LaCombe, Houston Chamber of Commerce

The magic is gone

By Mickey Torres

There was magic once in the Rio Grande Valley. Back when the downtown warehouses were teeming with goods, sales were by the case or lot number, cash on the barrel. Magic when the rail cars in Edcouch were loaded with hand-picked beets or cabbage, bound for East Coast housewives who demanded farm fresh vegetables.

Promoters and developers planted palm trees along the highways and convinced frozen Midwesterners that the area along the South Texas border was "Miami Beach at half the price."

Today, packing sheds sit idle and downtown has been taken over by money exchange houses and boutiques that offer the latest fashions in used clothing at 75 cents a pound.

Oldtimers say the magic began to fade when supermarkets stocked frozen vegetables. But everyone agrees the bottom fell out when the peso disintegrated. The retail sector of Brownsville, McAllen and Harlingen, Tex., shrank, sales tax revenue plunged and the tax base eroded.

What's left of boom time, according to the South Texas Institute for Latin and Mexican American Research, Brownsville, are 600,000 people, 85% Hispanic, occupying a string of mushrooming communities in one of the nation's most poverty-stricken regions. Not including another 215,000 people south of the ankle-deep Rio Grande, the area constitutes the eighth largest U.S. Hispanic market, according to Strategy Research Corp., Miami.

This market is expected to double by 1990 despite an 18.5% unemployment rate valleywide, which is three times the state average, according to the Texas Employment Commission. Adjoining Starr County's unemployment rate has hit 40%. If the citrus industry fails to recover from the past two killing freezes, the poorest people in the U.S. will get even poorer. De-

(Continued on Page 40)

Mickey Torres is a Brownsville, Tex.-based free lance writer.

Mickey Torres

Rio Grande Valley

Print

Title	Frequency
El Heraldo de Brownsville	6/wk

Television

Call letters	Spanish-language hours/day
K-12-TV	24

Radio

Call letters	Spanish-language hours/day
KGBT - AM	24
KIRT - AM	24
KIWW - FM	24
KQXX - FM	24
KOIR - FM	24

Albuquerque Visitors Bureau

Rooted in history

By Karen Evans

New Mexico Hispanics are an unusual Hispanic subculture with their Spanish roots—some of which predate the Pilgrims.

"In some parts of New Mexico we still speak a Spanish spoken hundreds of years ago," says Lionel Holguin, president of the Albuquerque Hispano Chamber of Commerce. "We use the old sayings, or *dichos*. The isolationism has caused us to create a unique market."

Immigrants are not flowing constantly into the area from other countries the way they are in Florida, Texas and California. "Hispanics have been here for generations, longer than the Anglos," says A.B. Coliado, publisher of *El Hispano*, the area's only Spanish-language newspaper.

Hispanics can't be considered a minority here, says Edmundo Delgado of Delgado Advertising & Public Relations, Santa Fe. "I don't consider myself a minority. I'm Spanish on both sides, but my cultural background is U.S.A.—American."

While other states with heavy Hispanic populations find that a majority report Mexico as their country of origin—California, 81%; Texas, 97%—more than half of New Mexico's Hispanics trace their roots to the Spanish colonists. Puerto Rican and Cuban immigrants, which make up large sectors of other Hispanic populations, are negligible in New Mexico.

"The Hispanics in California and Texas are trying to assimilate," says John Ramsey, client representative of Hispanic Advertising Consultants in Albuquerque. "Here, it's the Anglos who are trying to assimilate.

"The main strategy in New Mexico is to realize that it's a unique market," he says. "Very few advertisers are doing it right. They are saying, 'Oh, you

(Continued on Page 42)

Karen Evans, a Santa Fe, N.M.-based free lance writer, is a former editor of the Rocky Mountain News.

Albuquerque/Santa Fe

Print

Title	Frequency
El Hispano	weekly

Television

Call letters	Spanish-language hours/wk
KGSW	1
K48AM	168

Radio

Call letters	hours/wk
KABQ - AM	168
KANW - FM	3
KARS - AM	35
KLTN - AM	168
KXKS - AM	84
KDCE - AM	15.75
KUNM - FM	18.5
KNMX - AM	84

Source for all media charts: ADVERTISING AGE, "Burrelle's Hispanic Media Directory, 1984," Strategy Research Corp. "U.S. Hispanic Market 1984."

'Siamese twins'

By Ken Flynn

Cliff Sherrill, writing 25 years ago in the *El Paso Herald-Post*, described the international metropolis of El Paso, Tex.-Juarez, Mexico, as Siamese twins "joined together at the cash register."

If that statement was true in 1960, it is even truer today. But the cash register is not all that binds the two cities.

El Paso and Juarez are united in language, culture, traditions, philosophies and needs. Only the trickle of the Rio Grande separates the two communities. Developers have boasted that the two cities represent the largest international twin city; geographers have yet to dispute the claim.

Juarez has a population conservatively estimated at more than 1 million. El Paso's population is now more than 470,000, 60% of which is Hispanic. Strategy Research Corp., Miami, classifies El Paso as the 10th largest U.S. Hispanic market. When joined with its Siamese twin, El Paso-Juarez ranks fourth.

Whether fourth or 10th, El Paso represents a major Hispanic market. Some say it is the most unusual Hispanic market in the country because of its comparative geographic isolation and its strong ties with Mexico.

The El Paso-Juarez market is very traditional, slow to change, with an ever-increasing Hispanic influence, says Hector Bencomo, owner of Bencomo's Ruidoso Market, a 60-year-old neighborhood grocery store located four blocks from Mexico. "Our people are never going to assimilate into the mainstream of American society because there is a constant influx of new immigrants, almost daily.

"There is a great deal of interaction. We all have relatives 'on the other side of the river,' as we say. We speak the same language and have the same problems," he says.

Margarita H. Hidalgo, a lecturer at El Paso Community College who recently completed a study on border language habits and attitudes, says residents of Juarez speak quality Spanish, and that Spanish is a source of national identity. The Spanish spoken in El Paso is good Spanish also, she says, but among the younger Mexican Americans, there is an increase in Spanglish, beginning a phrase in Spanish and finishing it in English.

Ms. Hidalgo's study, a sampling of individuals from both cities, concluded that Spanglish generally is disliked by Mexicans, who are encouraged to withstand the cultural barrage from the north and keep the language pure. She says loyalty to Spanish in Juarez is part of the community's need to survive as a part of Mexico.

Cashing in on the unusual language situation in El Paso-

(Continued on Page 42)

Ken Flynn is chief of United Press International's El Paso bureau.

G.A. Rossi, ©The Image Bank

El Paso/Juarez

Print

Title	Frequency
El Continental	6 days/wk
El Fronterizo	daily
El Mexicano	6 days/wk
El Universal	daily
El Diario	daily

Radio

Call letters	Spanish-language hours/wk
KAMA - AM	87.5
KTEP - FM	10
NTNR - FM	10.5
KALY - AM	168
XEROK - AM	168
XEWG - AM	133
XEJ - AM	168
XEP - AM	168
XEPZ - AM	98
XEYZ - AM	168
XECJC - AM	112
XHTO - FM	126
XHEM - FM	126
XHIM - FM	168
XEF - AM	154
XEWR - AM	98
XEFV - AM	98
XEJPV - AM	98
XHH - FM	140
XHGU - FM	168
XHP - FM	168

Television

Call letters	Spanish-language hours/wk
KINT	87.5
KCOS	3
KCIK	2
KVIA	.5
KDBC	.5
XEJ - TV	126
XHIJ - TV	119

Los Angeles

(Continued from Page 14)
expected to become the majority population of Los Angeles, putting the city's non-Hispanic population in the unusual role of melting into another culture.

Already, the Los Angeles area of dominant influence is by far the largest U.S. Hispanic market, home to an estimated 3.4 million Spanish-surnamed persons—almost 20% of the entire U.S. Hispanic population—according to Strategy Research Corp., Miami. Strategy Research estimates 75% of these live in metropolitan Los Angeles.

This growing market is an ideal consumer segment because Hispanics spend a substantial amount on consumer products. A 1982 *Los Angeles Times* estimate pegged their annual purchasing power at $11.3 billion, and only New York Hispanics spend more each week on groceries, according to SRC.

Although the majority work in manufacturing (garment, aerospace or electronics industries) or services (hotels, restaurants or hospitals), a growing number are employed in higher paid professional positions. They also are members of a distinct, identifiable culture that can be reached in most cases by both English and Spanish-language media because 60% are bilingual.

Despite the fact that studies show many of their buying habits do not radically depart from those of the mainstream population, Los Angeles Hispanics traditionally have been classified as underprivileged people with little purchasing power. However, the mean Hispanic income has doubled during the past 10 years—the U.S. Census placed it at $18,732 in 1983. That buying power is bolstered by youth—their median age is 23, 35% younger than the national figure, and 70% are younger than 34.

But by virtually all accounts, the market remains woefully untapped. A recent study by *Hispanic Business*, for example, estimates that in 1984 advertisers spent $47.5 million in Los Angeles, compared with $46 million in Miami. "It's clear that Miami, with a population of about 580,000 Hispanics, sells itself much better than Los Angeles, with about 2 million," says Jesus Chavarria, editor and publisher of Santa Barbara, Cal.-based *Hispanic Business*.

He estimates the aggregate family income in Los Angeles for the same period was $10.6 billion, compared with Miami's $4 billion.

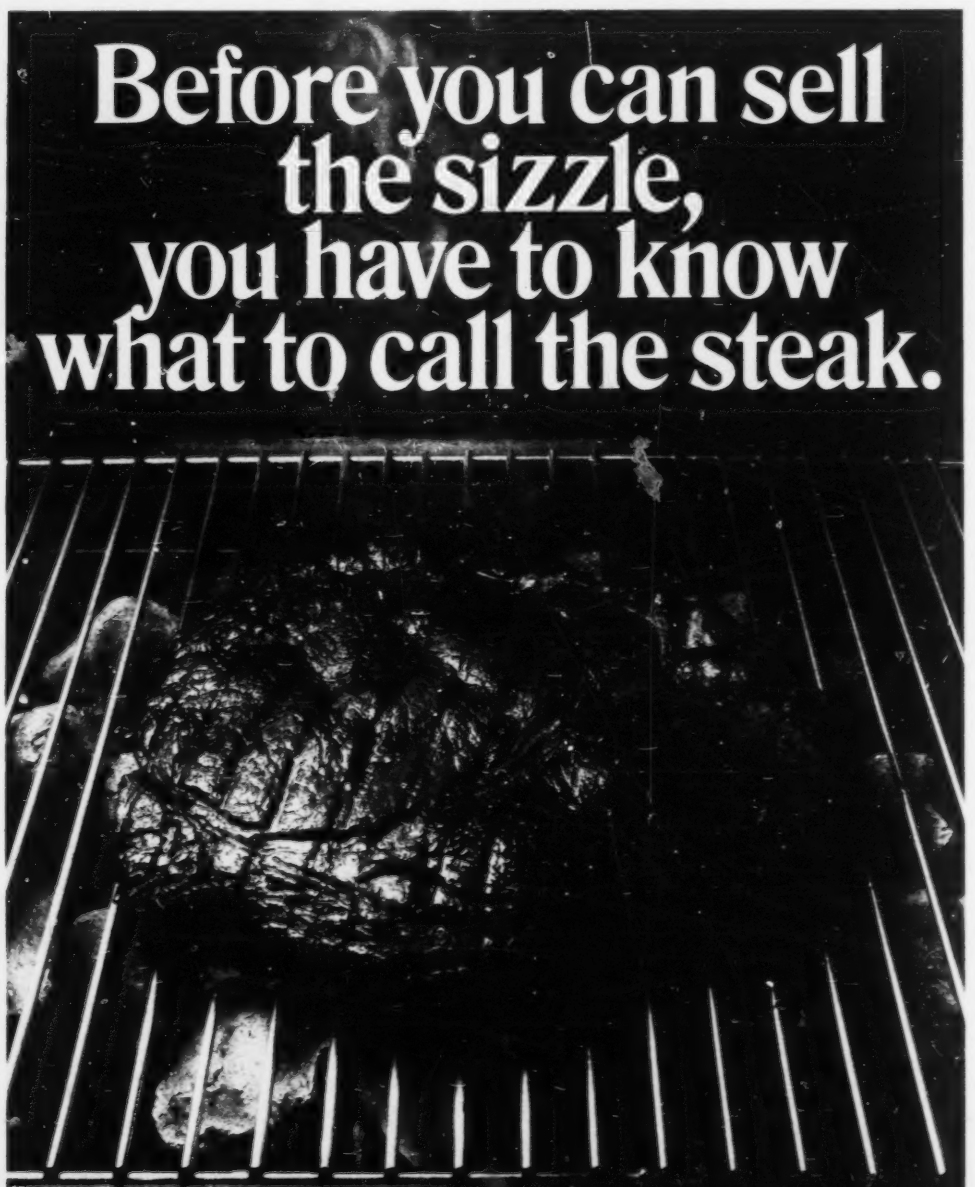
"The Hispanic market has the potential to pay tremendous dividends," says Jay Rodriguez, vp-corporate information for NBC-TV, Burbank, Cal. Mr. Rodriguez says traditional media in most markets, including Los Angeles, are ignoring Hispanics.

David Ochoa, president of Hispanic-owned Buenavision Cable of Los Angeles, concurs: "[Hispanics] are mainline, blue-chip consumers, but somehow the idea has emerged that they're different."

California Hispanics are different in a few important respects. Between 12% and 30%, depending on whose research is quoted, are fluent only in Spanish, while a similar percentage speak little or no Spanish. About two-thirds are bilingual, with about half of these preferring English. As in other Hispanic markets, language usage generally is divided along educational lines. The least educated—only 35% have a high school education or more—are most likely to use only Spanish.

Although Mr. Ochoa advocates "research, research and more research" as the best

(Continued on Page 20)



Before you can sell the sizzle, you have to know what to call the steak.

bistec, filete, tajada, bife, churrasco, lomito, bisté

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Strong identity present

In Southern California, Hispanics refer to themselves as Chicanos, Latinos, Hispanics, Mexican-Americans, Mexicans or of Spanish heritage. Each may be extremely sensitive about whether a term is used and quick to anger if it is not.

The distinctions go beyond language to include major cultural differences. Increasingly, advertisers are recognizing these subtleties in their media campaigns, attempting to cement an emotional bond with each ethnic community.

Not long ago, Anheuser-Busch hired Castor Spanish International, a New York-based agency specializing in Hispanic accounts, to produce separate Budweiser ads for four Hispanic groups: Mexicans, Cubans, Puerto Ricans and Latin Americans. Thus *mariachi* music was added for Mexican-descended Hispanics, while those aimed at Puerto Ricans featured Caribbean *salsa* rhythms.

Jesus Chavarria, editor and publisher of Santa Barbara-based *Hispanic Business*, says the debate about whether separate ads should be produced is shifting from a cultural to a socioeconomic focus.

As serious, high-quality market research becomes available, more sophisticated strategies will be used, he says. "My feeling is that you can develop a standard campaign for the Hispanic population of this country."

Mr. Chavarria also says campaigns based on emotional appeals may be more successful if tailored for a specific Hispanic segment. This is made more difficult by demographic changes. Until now, advertisers have assumed that Los Angeles could be approached with Mexican-oriented sales techniques.

"We're getting to the point now where Los Angeles is not just a Mexican-American market," Mr. Chavarria says. "There's a very large number of Central Americans and even Puerto Ricans now."

In the meantime, companies such as Los Angeles-based Rayo Asociados are prospering. A recently formed division of Rivas Film Associates, Rayo Asociados insists on tailoring its advertising to reflect five Hispanic groups: Californians of Mexican descent, Southwest residents of Mexican descent, Midwesterners of Mexican descent, Cubans of South Florida and Puerto Ricans in the Northeast.

Producers pay close attention to food, clothing, music, architecture, interior design and social behavior in their ads to reflect an authentic cultural context. Rayo Asociados uses a bilingual production staff to simultaneously shoot commercials

(Continued on Page 20)

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Los Angeles

(Continued from Page 18)
means for understanding the Hispanic consumer, that task is made more difficult by the fact that only 18% have listed telephone numbers and an estimated 1.4 million Southern California Hispanics are not legal U.S. residents. Because this contributes to census undercounts, local organizations have succeeded in officially revising Hispanic population totals up 10%.

Several studies have found Southern California Hispanics, perhaps more so than other Hispanics, rely on electronic media. Although the city has two daily Spanish-language newspapers, the circulation of the largest of these—*La Opinion*—has been about 70,000 for years.

The typical Los Angeles Hispanic spends more than 19 hours watching tv each week, 16 hours listening to the radio and four hours reading, according to recent studies. Bilingual or English-only speakers and more affluent Hispanics spend more time with print media. Only 7% subscribe to cable tv.

KWKW-AM is one of six Los Angeles-area radio stations broadcasting in Spanish full-time. In a 1982 study of 600 Hispanic households conducted by Carranza Associates and California State University at Northridge for KWKW, researchers concluded both English and Spanish should be used in marketing to area Hispanics. A bilingual approach "reinforces a sense of belonging and of consistent self-image for the entire target market."

The study documented "an inordinate brand loyalty and desire for product quality ... traced, in part, to the Hispanic's desire for positive and consistent self-image. Identification with quality and recognized brands can signify that the individual is giving the best to the

(Continued on Page 24)

Identity

(Continued from Page 18)
in both English and Spanish.

Ray Rivas, a commercial director for the company, says this approach represents a substantial improvement over the early days of Spanish-language tv, when English-language dubbing was common.

"The sophistication level has risen and there's upward mobility in the community," Mr. Rivas says. "Nevertheless, I still find agencies budget about 20% less than what they are paying for Anglo campaigns."

Mr. Rivas emphasizes that cultural differences can be reflected in subtle ways. "Some Anglo agency people want to show cereal being served in a Mexican-looking bowl ... and a *serape* casually draped over a chair. I have to tell them, 'You don't have to beat people over the head with this.'" Less blatant—and patronizing—distinctions include showing women wearing skirts rather than pants or men wearing designer jeans at a picnic, he says.

Although he says they often are naive, Mr. Rivas agrees that Anglo agency executives are more receptive than in the past, in part because of groundwork by radio stations and their agencies. Caballero Radio Network, for example, published a list of different ad-related Spanish-language terms as a means of convincing advertisers they needed to buy regionalized radio advertising.

Ernesto Balleste, vp-managing director of Noble y Asociados, Newport Beach, Cal., acknowledges linguistic differences among Hispanic groups, but says his agency is not interested in subdividing Spanish-language ad campaigns. "I think that in radio, especially, such regionalization is a natural," he says.

"But there is such a thing as neutral Spanish. It is one language," he says. "There is a way to use Spanish that is acceptable to everybody, including Mexicans, Puerto Ricans, Cubans, Dominicans and Argentines."

In addition, many companies that are reluctant to budget for Hispanic messages might be shocked by the production costs of four or five separate versions of the same campaign.

Hector Orci, vp-general manager of La Agencia, the Hispanic division of McCann-Erickson, says it's important to recognize that the Los Angeles Hispanic market is predominantly bilingual and bicultural.

"Depending on the situation, sometimes it is necessary and desirable to use specific approaches to specific groups of Hispanics," he says. "But sometimes it isn't. It depends on the marketing strategies of the brand or the account."

Although La Agencia sometimes tailors its campaigns along cultural subdivisions, Mr. Orci says generally it is not necessary. "More important to us is ensuring the use of correct Spanish," he says.

Perhaps even more important is to communicate with Hispanics at all. Advertisers that deemphasized the Hispanic market in the past are surprised to find them so appreciative of efforts to reach them in their native language, Mr. Orci says.

Mr. Balleste says Spanish-language advertising is effective even in convincing predominantly English-speaking Hispanics that an advertiser is interested in them. "Your mental reaction is, 'That was written for me, because I understand Spanish.' When the commercial is in English, it can never register in the same way." —*R.M.*

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Tel.: (212) 687-8760

Los Angeles

(Continued from Page 20)
family or to guests."

Los Angeles Hispanic consumers, the report concludes, "spend an inordinately high percentage of their income on products, services and entertainment for *la familia*."

Although it estimates it attracts 70% of these loyal buyers, KMEX, the only fulltime Spanish-language tv station in Los Angeles proper, has had difficulty attracting national advertisers. "Our schedule is 70% local and 30% national," says KMEX president-general manager Danny Villanueva. "I can deliver people, I just can't deliver numbers sometimes," adding his opinion that the major tv ratings companies—A.C. Nielsen Co. and Arbitron Ratings Co.—still "don't know how to measure us."

KMEX also offers advice on how to target Hispanics. Programs "must include children, young, adults, parents, working women and grandparents," a published ad appeal says.

Hispanic Business' Mr. Chavarria is encouraged to find a growing number of agencies specializing in the Los Angeles Hispanic market. In Newport Beach, Cal., Mendoza, Dillon & Asociados promotes such clients and products as Miller Brewing Co., Denny's Restaurants, Johnson's Band-Aids, Ban deodorant and Vitalis. Beverly Hills-based Bermudez & Associates' clients include American Telephone & Telegraph, Stroh's, Schlitz and Schaefer beers.

Some major agencies farm out Hispanic marketing work to these smaller companies because rates, and thus commissions, are generally low. For example, KWKW charges about $70 for a commercial that would cost up to $500 on another station to reach the equivalent audience. Others have established their own in-house Hispanic units, notably McCann-Erickson's La Agencia, Young & Rubicam's Bravo Group and J. Walter Thompson USA's Hispania.

Castor A. Fernandez, president of Castor Spanish International, a New York-based Hispanic agency, says, "The growth of the market from here on in, with the attention that it is now being given, and will be given, by the big boys in marketing, will be by leaps and bounds."

For those interested in the Los Angeles ADI, 3.4 million prospects are waiting to hear what you have to say.

New York

(Continued from Page 14)
New York area of dominant influence, the Puerto Ricans' edge as market leader is lessened," Ms. Conill says.

Because immigrating Puerto Ricans—as residents of a U.S. possession—already are registered citizens, the well-established underground Hispanic population is made up of primarily Central and South Americans, she says.

Puerto Ricans are more transient than other immigrating Hispanic groups, says Thomas Johansen, vp-sales director, WNJU-TV. Because the ties are strong and the travel unrestricted between their island home and adopted residence, they are more likely to come to the states for a few years and then go back to Puerto Rico, he says.

New York is different from the other major U.S. Hispanic markets, Mr. Font says. He cites three reasons: Puerto Ricans predominate; Spanish-language media representation is strong, and "New York has subways."

Subways are a very important, often overlooked medium in New York, he says. Hispanics average 25 minutes a day commuting on the subway. With such a captive audience, he says, advertisers can make a tremendous impression.

"There is a very high dependence on mass transit by Hispanics in New York," Mr. Psaltis says. "Statistically, fewer than 25% of the city's Hispanic market owns automobiles. Outdoor boards are an important sell in Miami or L.A., where cars are a necessity. In New York, however, pedestrian boards are better suited."

On any given weekday morning, the city's George Washington Bridge bus terminal is besieged by Hispanic rush-hour commuters, en route to primarily low-paying jobs in New Jersey factories and offices.

The median family income for a New York Hispanic family is $16,300, which falls short of the $19,900 national average for the group, according to Strategy Research. Although the latter figure is lower than the over-all U.S. median income of $28,400, U.S. Hispanic families are the most financially secure of all Hispanics in the world, the company's report says.

"When they come here, they come for a better life. They come to make it," says Daisy Exposito, vp-creative director, Young & Rubicam's Bravo Group. One affordable way of showing that life has improved is with food, she says. This helps to explain why the approximate weekly grocery expenditure for a New York Hispanic family, which averages 3.71 people, is the highest among U.S. Hispanics at $101.

Hispanic consumers in New York are aware that they have purchasing power as a bloc, Ms. Exposito says. And much of that power is channeled through the area's more than 10,000 *bodegas*, the mom-and-pop shops. Any product an advertiser wants a New York Hispanic to purchase must be highly visible in the *bodegas*, Mr. Font says.

It is necessary to get distribution through the cash-and-carry outlets or a product will be shut out of the Hispanic market, says William Stiles, exec vp, SIN Television Network, New York. Many *bodegas* will not carry a product that is not advertised to the Spanish market, he says.

WNJU's Mr. Johansen says making the effort may result in garnering a share of the $5 billion New York's Hispanic consumers spend annually. "Even with the token advertising . . . those brands that bother to advertise in Spanish will be the No. 1 or 2 brand in each of their categories," he says. "The Hispanic who sees the Anglo company that bothers to advertise to them in their language will become brand conscious and brand loyal to that company beyond the advertiser's wildest expectations."

Opportunity and growth are the primary objectives of the Hispanic community; education and jobs are the main issues, Mr. Johansen says. Many schools with high Hispanic enrollments are bilingual, a move that aids education but reduces the need for acculturation.

The impact, Mr. Johansen says, "is a statement of pride. Hispanic people are understanding their new-found force. They are in a way saying—and there's nothing you can do to change it—I will go to Spanish movie theaters; I eat at Spanish restaurants; I have two Spanish tv stations."

"In New York today a person can live and work without speaking English . . . they can even get a Spanish driver's license," says Eduardo Caballero, president of Caballero Spanish Media, a national Spanish-language radio representative.

Over-all, New York Hispanics are enthused about the progress they have made in recent years. Mr. Caballero, a Cuban native who has been in New York for 20 years, says he has witnessed an increase in "pride in one's background" among Spanish-speaking people.

"Ten years ago many Hispanics were afraid to let their heritage be known . . . even when it came to reading a Spanish newspaper in public they would often avoid it because of embarrassment; they were ashamed to let others know about their background," he says.

Along with this esteem—and in an effort to further themselves—Hispanics have become more politically aware. The Hispanic community has felt closer to the black community, both emotionally and politically, Mr. Caballero says. "The Hispanics went to Harlem in part because they were attracted by the black push for equality and strength."

(Continued on Page 28)

More and more Food advertisers are saying "Si!" to El Diario/La Prensa ...

National Food Linage Up 93%!

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Franco-American Foods Roman
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La Salle Ice Cream Goya Foods
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Accent Sun-Maid Cereal Malta
Dukesa Seven-Up Bustelo Café
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New York

(Continued from Page 24)

he says.

"The influx of other Latins [from Central and South America] into New York from politically charged countries also has had an effect," Mr. Caballero says.

"The new residents are helping to change the composition of the Northeast's Hispanic community from a mainly Puerto Rican and other Caribbean type of market, to one that is more heterogeneous. Puerto Ricans remain the dominant group but the global mix makes New York a one of a kind market," he says.

But the merging of Hispanic groups from varied backgrounds into the New York area had not resulted in a united political front.

"Puerto Ricans have traditionally been Democrats," Mr. Caballero says. Cubans and Argentines on the other hand are more conservative, he says.

A recent flap may have provided the issue that solders the community. A coalition of blacks and Hispanics had selected Herman Badillo to contest Mayor Ed Koch in the upcoming mayoral contest. When the black community then selected its own candidate, a rift separated the two minority communities.

Where the Hispanics previously might have been mired in indecision or split their support, they have banded together behind Mr. Badillo and appear to be ready to fight their own battle.

This could be a turning point. According to Mr. Caballero, New York Hispanics have been among the least politically influential.

Texas, for example, has some 39 mayors of Hispanic background, he says, while New York state has none. "Sooner or later you will have a Latin mayor in New York . . . maybe not now but the potential is so strong," Mr. Font says.

But before that happens, they will have to unite. "The subject of unity was proven by the Yankelovich [Skelly & White] study that indicated Hispanics are now considering themselves Hispanic as a whole," says Rochelle Newman, director-new accounts division, Font & Vaamonde. "Less and less are you seeing, 'I'm Cuban, I'm Puerto Rican, I'm South or Central American.' There's a unity that's happening and the stronger that unity becomes the more influence it will have."

Miami

(Continued from Page 14)

deposed dictators Somoza, Trujillo and Batista; Fidel Castro's sister, Juanita, a pharmacist; Juan Bosch, retired chairman of Bacardi Corp., worth an estimated $300 million; Eduardo Suarez, who fled Cuba four years ago and is winner of five Emmy Awards for WLTV.

Meet Miami's Hispanic community, as seen through the media:

Ricardo Tubbs, the Puerto Rican half of the "Miami Vice" team; Tony Montana, "Scarface" with his mountains of cocaine.

Meet the rest of the Miami Hispanic community:

A majority of Miami, a plurality of Dade County, 805,800 strong, the most affluent and aggressive Hispanic enclave in the U.S.

Dramatic events have shaken Miami, causing irreversible changes in the Hispanic community. These changes have hardened lines among Miami's once fairly harmonious ethnic groups, and foretell a startingly different Miami in the 1990s.

"The community is simply not shoulder to shoulder, side by side as it was in the 1970s," says Richard Tobin, president of Strategy Research Corp., Miami. Evidence of this rupture reverberates thoughout the state. A proposed amendment to Florida's constitution would make English the state's official language. The three-person Hispanic majority on the Miami

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Advertisers that reach target reap great rewards

The Hispanic market presents an advertiser with both a problem and an opportunity. The problem: Finding the surest method of reaching the consumer. The opportunity: Knowing that a successful campaign can pay sizable dividends.

The methods of how to solve the problems and make the most of the opportunities are elements of a major debate. Advertising and media experts fail to agree on the ideal execution because some say the Hispanic community is homogeneous, while others are adamant that it is a collection of subcultures.

"No question about it," says Thomas Johansen, vp-director of sales, WNJU-TV. "Mexican Spanish is as different from Caribbean Island Spanish as British English is to [an American]. Even though it's English, the accent is different, the colloquialisms are different."

Eduardo Caballero, president of Caballero Spanish Media, agrees. "Most people who share a philosophy that the Spanish market should not be segmented are generally those who do not speak Spanish." He advises advertisers to concentrate on being emotionally appealing to the consumer by paying close attention to the unusual features indigenous to each group.

According to Alicia Conill, president of Conill Advertising Associates, subdividing the market and targeting Hispanic groups from different areas with separate campaigns does little more than dilute the total market's impact. "Even though the market is so mixed, you can sell to this market in a generic Spanish way," she says. The key is to look for similarities among each group and use them to your advantage, she says.

"There is only one [group of] Hispanics," says Pedro Font, president of Font & Vaamonde, who says he cannot understand why some people suppose Hispanic people are so different simply because they come from different countries.

"We believe in the national approach," says Daisy Exposito, vp-creative director at Bravo Group, Young & Rubicam's Hispanic division. Ms. Exposito does concede that specific areas do need individual consideration.

"People who believe in segmenting believe that you have to have *salsa* [music] in New York and *cha-cha* in Miami. That's a nice approach," Ms. Exposito says, "but you can also do a nice general approach that will sell all groups."

Many agencies avoid segmenting the market because of the cost involved in preparing separate executions and the traditionally smaller budgets allocated for the Hispanic market. The economics usually preclude separate executions, Ms. Exposito says. "So you do one tv execution that will do well across all the subsegments." Only when it's a regional or spot placement should the local flavor be prevalent, she says, otherwise it's "not a necessity."

Opportunities to reach the market both locally and nationally exist. "If you have a healthy advertising budget you should use all four mediums: Tv, radio, print and outdoor," she says.

"We operate a television network in 80 ADIs nationwide and send the same programing and the same commercial messages all over the country," says William Stiles, exec vp, SIN Television Network. "Obviously we have a viewpoint that you can program and advertise to this segment as a monolith. There are many more similarities than there are differences."

Mr. Caballero touts radio as "the most effective method to target Hispanics," saying the other mediums do not match radio's reach. Houston has seven stations while New York boasts four that carry 24-hour Spanish-language programing: WADO, WKDM, WJIK and WSKQ. Indicating the market's growth, Mr. Caballero says, "as little as two years ago there were only two stations servicing the [New York] area." In addition to the 24-hour stations other networks in New York carry limited hours of Spanish programing.

Thomas W. Koopman, sales manager for De Armas Publications, New York, says print—not radio or tv—is the most effective way advertisers can speak Spanish with prospects on a national level. His opinion is understandable because De Armas blankets the nation with Spanish-language magazines aimed at most demographic levels.

"Print advertising offers advertisers more time to get their messages across than a 30-second spot on tv or radio," he says.

However, Messrs. Koopman, Caballero and Stiles agree that advertisers should not ignore any medium.

Media placement aside, Ms. Conill says the main issue is proving the power of the Hispanic market—a power that is increased by homogeneous numbers

Advertisers know a large Hispanic population exists, Mr. Caballero says, and if they are to reach them, they must ensure that each group within the whole is equally targeted. And the only way to do so is to "target each segment individually," he says.

The real goal, Ms. Exposito says, is "to prove to people that yes, there's money to be made in the Spanish market." *W.F.G.*

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Miami

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city commission recently ousted the black city manager, and blacks and many Anglos retaliated by petitioning for the recall of Mayor Maurice Ferre, a Puerto Rican.

"We have a problem," Mr. Tobin says.

The problem's roots go back to May, 1980, when 125,000 people fled Cuba in the Mariel boatlift. About 100,000 of these "Marielitos" settled in Miami, and the differences between them and earlier waves of refugees have recast forecasts of Miami's future.

The Mariel influx accelerated an already steady climb in the number of Dade County Hispanics. Between 1980 and 1983, the Dade County Hispanic population increased 204,106, according to the U.S. Census Bureau; non-Latin residents increased only 39,713. The surge of Marielitos boosted Latins to a 43% plurality, compared with a 40% white and a 17% black population.

"What happened after Mariel was that Latins stopped melting" into the general population, says Frank Soler, publisher of *Miami Mensual*, a Spanish-language city magazine.

Most observers agree with Mr Soler. "Throughout the 1970s," Mr. Tobin says. "the Cuban community developed economically and socially in concert with Anglos. With the rescinding of Dade County's bilingual ordinance, Cubans, who thought that they had been companions in community progress, then felt a real slap."

A general airing of frustrations by Hispanics followed Mariel and the repeal of the bilingual ordinance, says Eduardo Padron, vp, Miami-Dade Community College. And, according to Joaquin Blaya, vp-general manager of WLTV, Miami's Hispanics perceived "clandestine bigotry" by Anglos after Mariel.

Some disagree, of course. "Mariel is over, the impact is over," says Luis Botifoll, chairman of Republic National Bank.

But even if the impact has subsided, the boatlift's residue can be measured. In 1980, according to SRC, the median annual family income of Cubans was $18,245, or 91.6% of the U.S. median. This year, Cuban

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Cuban pride in heritage steers market

"Miami 'Hispanics' do not think of themselves as Hispanics," says Isabel Mola, president of Interamerican Marketing and Communications, Miami. "The Cubans and Cuban-Americans are very proud of their heritage and are a very aggressive and assertive people. They will never think of themselves as 'Hispanics.' They will always keep their identity."

Because of this, most media and advertising executives agree that when speaking to Miami's 805,800 Hispanics, 84% of whom are Cuban, it should be done in their dialect.

The basic social difference between Miami's Cubans and other U.S. Hispanics is rooted in the varying motivations for emigrating. The overwhelming majority of Mexicans and Puerto Ricans came here because of economic reasons. But Cubans who came to Miami in the 1960s were fleeing not economics, but Fidel Castro.

Cubans are "more concerned with international politics than with local issues," Ms. Mola says. The intensity of this feeling has made Spanish virtually a requirement for reaching Miami's Cubans.

The media provide a good lesson. Between 1980 and 1985, Dade County's population increased from 1.3 million to almost 1.9 million, or about 48%. Meanwhile, the Miami Herald showed an anemic 2.5% increase in daily Dade County circulation, according to the *Herald's* market research department.

Even the introduction of *El Herald*, which is delivered free along with the "main" *Herald* to all subscribers with Spanish surnames, has done little to plug the dike of eroding penetration. By comparison, *Diario las Americas* has more than doubled its circulation since 1973.

Similarly, while the three network-affiliated tv stations were hammering at each other for ratings, WLTV, the SIN Television Network-affiliated Spanish-language station, has attracted the largest audiences of any local station during both local and national news, according to Arbitron Ratings Co.

Local marketers realized in the 1960s and 1970s the need to address Cubans in Spanish. Retailers such as Farm Stores, Winn Dixie and Big Daddy's Lounges all have learned Spanish and profited by it. But, as *Diario* advertising director Enrique Perez says, "The giant national advertisers are slower to respond to Spanish."

Joseph Albonetti, director-Hispanic and international marketing, Tinsley Advertising, Miami, states the problem more emphatically. "Frankly," he says, "we are still a long way from attaining universal recognition of the importance of the Hispanic consumer by many otherwise astute advertisers."

After getting recognition, the next question is how to best reach Dade County's Hispanics. "Advertising must be culturally relevant," says Herb Levin, president of WSUA-AM. And "it must recognize the subsegments of the Hispanic market."

Variations in the Spanish spoken by Cubans, Puerto Ricans and Mexicans are not dialects, says Jorge Garrido, president of Mingo-Jones-Garrido, "they are 'isms'—Cubanisms, Puerto Ricanisms and Mexicanisms—expressions that vary from countries of origin and therefore different parts of the U.S."

Teri Zubizaretta, president of Zubi Advertising, agrees, asking, "Would you sell a product the same way in both Boston and Alabama?"

Ana-Marie Brechner, president of Inter American Communications, Miami, says even among Cuban-Americans, differences should be noted. Ms. Brechner devises different messages depending on the location of the audience.

Tampa Bay has a large Hispanic community, whose members mostly came to the U.S. several decades before Castro's revolution. "Tampa's Hispanics represent an older culture and tradition from Cuba than do most Miami Cubans," Ms. Brechner says.

The need to segment the Hispanic market often is illustrated by language gaps and gaffes. In New York, for example, *habichuelas* would refer to any type of bean. But that word would leave Cubans and Mexicans cold —a bean to them is a *frijole*.

According to Ms. Zubizaretta, an advertiser does not have to be overly concerned about subgroups within the market. "Here in Miami," she says, "Nicaraguans assimilate to the Cuban message. And Cubans in New York don't resent the Puerto Rican message."

Many marketers now are touting the existence of the "national Hispanic market." "We are interested in trends that indicate that there is a little more homogeneous nature to the Hispanic market than we had originally believed," says Sidney Levin, a partner with Beber Silverstein & Partners, Miami.

"Each market has its own characteristics," he says. "But it is possible to approach the [national] Hispanic market with a single campaign." Another trend is that the "upscale Latin consumer increasingly can be reached by the general media, especially television."

Joaquin Blaya, general manager of WLTV, also sees a more homogeneous national Hispanic market. "There were great differences in the United States among different regions, differences of culture and language," he says. "But network television became the common denominator, and we now accept a fairly universal 'American English.'"

Now, Mr. Blaya says, "the same thing is happening with Hispanics. SIN is the only national medium reaching all Hispanic groups, and we are seeing the emergence of a general 'broadcasting language.'"

More important, Mr. Garrido says, is whether a company should advertise to Hispanics at all. "Segmentation has been an excuse to not target the Hispanic market when the product's budget isn't that great. For products sold *en masse*, where the budgets are astronomical, it pays to localize the effort in the same way you would localize any national effort.

"But the key questions are; should we address the market and then how should we address it?" Mr. Garrido says. "It's a quantitative judgment first, then a qualitative." —*J.F.S.*

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Miami

(Continued from Page 30)

income has increased to $24,400, but has slid to 85.9% of the U.S figure. Although still much higher than any other U.S Hispanic group—the average is $19,900—this decline has not gone unnoticed.

"You now have to break down the Cubans by age and time of arrival in the United States," says state Sen. Joseph Gersten, one of the few Anglo politicians supported by the Cuban community. "If you combine all of Miami's Hispanics," he says, "the statistics show a more insular, lower income group."

Generally, the income decline is attributed to the unskilled and blue-collar occupations of most Mariel refugees, compared with the large numbers of professionals and entrepreneurs in earlier waves. The educational level among recent arrivals is much lower. And, says Herb Levin, president of WSUA-AM, "You can't ignore the fact that [Mariel refugees] spent 20 years under a socialist system. Their values are different."

Again, some disagree. "I think this is the only community in the nation able to assimilate 100,000 individuals in six months," says Teri Zubizaretta, president of Zubi Advertising.

On one point, few disagree. If language is an indicator of change, then change has occurred. "With Mariel, the increase in Spanish use is up 10%," Mr. Tobin says.

The Marielitos were primarily monolingual, and, according to Enrique Perez, ad director, *Diario las Americas*, "it isn't that there has been a reluctance to learn English. There simply hasn't been a need [for new arrivals] to learn English."

The primary reason English is almost superfluous along *Calle Ocho*—SW 8th St., the heart of "Little Havana"—is the strength of the Spanish media. Uhf station WLTV regularly bests the three network and several independent stations in both local and national news show viewership and during many other time slots. "Unfortunately, among many [national] advertisers, this is still an untold story," Mr. Blaya says.

The Latin community is served by two Spanish daily newspapers, *Diario las Americas* and *El Herald*, a Spanish version of the *Miami Herald*, and dozens of weekly newspapers. According to Mr. Perez, *Diario's* advertising and circulation success is partly because of the post-Mariel attitudinal shifts among Hispanics. "It's not that Latins can't read the *Herald*," Mr. Perez says. "They no longer feel the need to assimilate, so even if they speak perfect English, they prefer their own media."

Seven Spanish-language radio stations serve the market, ranging from WQBA-FM, with a pop, bicultural brand of Spanglish, to political diatribes on WRHC-AM and WOCN-AM. The Spanish-language stations routinely occupy top spots in rating polls.

Miami also has a booming Spanish-language magazine business, led by Editorial America, publisher of the internationally circulated *Vanidades* and other publications. Also with a strong international circulation—and plans to expand to other Hispanic markets—is *Miami Mensual*. Mr. Soler attributes his success to "reflecting the aspirations of Cubans. We are very upwardly mobile."

According to Strategy Research, although South Florida's Latins represent only 5.8% of the total U.S. Hispanic population, they will spend $11 billion this year on consumer goods, or about 12% of the nationwide Hispanic expenditure of $94 billion. "That's twice the per capita consumer goods expenditure compared to the national Hispanic average," Mr. Soler says.

Other distinguishing demographic information on Miami's Latins includes:

- Cubans have the smallest households of any U.S. Hispanic group at 3.3 people.
- The percentage of Cubans who have completed four years of college is about equivalent to the total U.S. population.
- Both Cuban males and females lead all Hispanic groups in managerial and professional employment at 19.4% and 15.7%, respectively.
- Of all Hispanic groups, Cubans have one highly significant low figure: English proficiency. Only 28.9% say they speak English well or very well, and 31.2% say, "*Yo no hablo Ingles.*"

"Those patterns aren't likely to change," Miami-Dade Community College's Mr. Padron says. "But we are undergoing a period of adjustment."

What this adjustment will lead to remains in question, but may be determined by two major international situations.

The first of these situations is the Reagan administration's decision to expedite normal residency status for the Mariel refugees, making their families eligible to leave Cuba for the U.S.

"We are probably going to see 25,000 to 35,000 new Cubans a year for the next eight years or more arriving in Miami," Mr. Perez says.

Almost undoubtedly it will result in an absolute Latin majority in Miami. Excluding the Mariel influx, the Latin population has grown 3% annually during the past 15 years, compared with a non-Latin figure of only 0.7%. That disparity in growth could lead to a Latin majority as soon as 1993.

The other major international factor looming on Miami's horizon is the future of Latin American, Central American and Caribbean economies and governments. Fidel Castro turned Miami from "a small tourist town on the decline into a major commerce center," Mr. Botifoll says. Everyone came to Miami in the 1970s to do business.

When the bottom fell out of the Latin economies, trade declined, as did Latin American tourism—from 1.3 million in 1982 to 896,000 in 1984, the lowest level since 1978, according to the Dade County Department of Tourism. Similarly, office vacancy is setting record highs, and hundreds of luxury condominiums are empty.

The only certain area of Hispanic growth, other than additional waves of Cubans, will come from countries in revolution such as Nicaragua and El Salvador. Mr. Perez says this will result in a decade of political adjustment, and only Anglo politicians with strong ties to the Latin community will survive.

"The new generation of young Cuban businessmen are really more American than Cuban," Mr. Botifoll says. "As they increasingly take over the leadership of the community, we will again become united."

Mr. Tobin agrees, saying, "We could already be on the way back. However, there will be a difference. The Cubans were fooled once that they were full partners. Now, they will demand to be full partners, and they won't readily give up their culture and language."

"Miami will never be a melting pot again," WLTV's Mr. Blaya says. "But we will become a tasty mixed salad."

San Antonio

(Continued from Page 15)

—it jumped more than 27% in those five years—but because other Hispanic communities grew faster. Part of that growth difference, local marketers say, is because of Hispanics' move toward middle-class Anglo life styles, a move that includes smaller families.

Emilio Nicolas, president of KWEX-TV, San Antonio's only Spanish-language tv station, doesn't necessarily agree, but he does admit the strangeness of the South Texas market. "This is like the twilight zone," he says. "It is neither light nor darkness. This is neither Mexico nor the

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San Antonio

(Continued from Page 32)

United States. This is neither Latin America nor the typical rest of North America. This is not a pure Anglo city or a Mexican city. This is in between.

"And what happens here is very funny," Mr. Nicolas says, "because the Mexicans are bilingual and communicate very well with the Anglo. The Anglos are not bilingual. They are only one way streets and we are two-way streets."

These two-way people are usually young and poor. Some 41% are younger than 18, and 69% are younger than 35.

The San Antonio Hispanic had a 1983 median income of $15,171, and as much as one-third of the city's Spanish-speaking population would be classified as "poor" by the Census Bureau. As those numbers indicate, chronic underemployment is a problem. Of the Hispanic work force 24 years old and older, only 12% hold managerial, professional or technical positions.

But these kinds of numbers are not uncommon to the whole community. The local economy is governmental and service oriented. While San Antonio is gaining fame as a high-technology center, most of these jobs arrive in hourly wage assembly plants.

In fact, industry has been attracted to the city because of the availability of inexpensive, unskilled, nonunion labor—primarily Hispanic.

San Antonio is filled with those little quirks. The city, with its graceful plazas and cobblestone downtown river walk, has an easy and comfortable bicultural feel.

But the city is divided, with most of the economic generators on the city's northern edges. The south side contains four of the five original Spanish missions in the area. All of the four still have active parishes. The fifth—the Alamo—is crowded with tourists.

Even the city's 105-year-old, 10-day Fiesta added its first Hispanic-oriented event only a few years ago. About the same time the local chamber of commerce ran a cover story in *San Antonio* about the city's tv sportscasters, overlooking the existence of KWEX-TV.

This polarity is not hostile, but merely another aspect of the city's schizo personality. When an issue commands it, Anglo and Hispanic quickly unite—and just as quickly separate.

Hispanics are making great advances in the local political arena, but in San Antonio's business and social life, it is another matter. Out of more than 70 banks, fewer than 5% have Hispanic top executives.

"In the San Antonio Hispanic culture, the way to be polite is a bit like the southern culture only more so," Mr. Sosa says. "There is a saying in Spanish, '*a sus ordinance*,' which means 'I am at your command.' That is polite.

"What happens is that part of the culture in the United States sees that as a very subservient type of personality, one that doesn't want to make waves," he says. "But what has happened with that attitude? We have an Hispanic mayor. We have representatives on the city council, two Hispanic congressmen, an Hispanic police chief. How has this subservient attitude manifested itself into such great political power? I think the reason is that attitude says I want to do it your way, and I am here to be

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Cultural keys unlock effectiveness

After you identify the San Antonio Hispanic—if you can identify the San Antonio Hispanic—comes the major task of reaching him. That is not easy either. Nor is there much agreement on how to do it.

Lionel Sosa, president-creative director of Sosa & Associates, handles such national Hispanic accounts as Anheuser-Busch, Brown & Williamson Tobacco and Westinghouse Electric. He says he believes strongly in the bilingual approach. "I tell them to look at the Hispanic first as a cultural phenomenon. There are cultural differences and language is only one of them," he says.

"You should consider English media just as much as Spanish media in San Antonio. I would recommend an advertiser produce English-language radio and television commercials directly to the Hispanic just as in Spanish language. And I would tell them to forget Spanish print in any shape or form," Mr. Sosa says. Hispanics in the San Antonio market "can't read Spanish to save their lives."

He recommends an advertiser "depict the Hispanic just as you would an Anglo. Don't put him in a Mexican rodeo or at a pinata party. Depict him as an American—and then make those wonderful little nuances in the execution."

One example is a Sosa spot—done in conjunction with N W Ayer, New York—for the U.S. Army. An Hispanic father working in his garage is telling a neighbor how his son just received an R.O.T.C. scholarship. His son walks into the scene.

"*Let's get going, Dad,*" the son says. "*Yes, sir, mi general,*" the father responds with a grin.

All of the cultural keys are there, Mr. Sosa says: A family orientation, pride of accomplishment, a desire to advance and those two words of Spanish that anyone can understand. "You're talking like a Hispanic would talk and triggering a response so that he knows immediately that that is for him," and you don't turn off Anglo viewers, he says.

Even though all of his accounts are national, Mr. Sosa says San Antonio is the place to test his spots. "This market, from an attitudinal point of view, is where the red flags will come up in the way Hispanics are depicted. The people in California and Miami are much more tolerant. People in San Antonio, while acculturating faster, are less confident of their own identity, so problems with commercial messages will tend to surface here quicker."

The local Spanish-language media, however, think Mr. Sosa's techniques are designed more for Anglo ad executives than for Hispanic consumers. "We hear a lot of stuff from the agencies that we can reach the Hispanic market with English," says Nathan Safir, vp-general manager of KCOR-AM, the country's oldest fulltime Spanish-language radio station. "But we turn down accounts, and big accounts too, by refusing to use any English copy."

KCOR is tied for sixth place in a 27-station market. Mr. Safir says the formerly top-rated station would head the ratings again if Arbitron Ratings Co. had not changed its methodology, measuring only listeners with telephones. According to Strategy Research Corp., 13% of San Antonio area Spanish-language households do not have phones and 44% have unlisted phones.

Unfair treatment by the rating services is the opinion at KWEX-TV as well. KWEX, a SIN Televison Network affiliate, was the nation's first Spanish-language tv station. It carries programing mostly from Mexico, and it also rejects any ads using English.

"We are dealing with Spanish-speaking Mexican-Americans," says Emilio Nicolas, KWEX president. "This is the programing that they identify with. This is the programing where people talk like they do, look like they do and do things like they do. We are the only people bringing all of that, so we must have one hell of an audience.

"It is not *our* problem. We suffer from the rating services' lack of capability," he says. "This is the same programing that is No. 1 in Miami and No. 2 in Los Angeles, but in San Antonio, it doesn't exist in the Arbitron or Neilsen books. That doesn't speak against us, but it does speak against their system."

In a Strategy Research Corp. study paid for by SIN, KWEX emerges with half of the San Antonio Hispanic audience, burying the local English-language network affiliates. But local advertisers don't appear to believe those numbers. While Mr. Nicolas says his national ad billings doubled last year, local advertising increased only 13%. KWEX has an estimated 11% of the local advertising market, while CBS-affiliate KENS has about 34%.

Spanish-language media receive little business from local agencies, confirms Carlos Montemayor, president of Montemayor y Asociados. "They are trying hard, but the local agencies seem to feel they can reach the majority of the Spanish market through English-language stations."

He counsels a middle road. "In English or in Spanish? Part of the market in San Antonio is Spanish-speaking only, so you have to do some, but what percentage? That's where all of these theories break down. I don't know if you can really tell that." —*R.E.*

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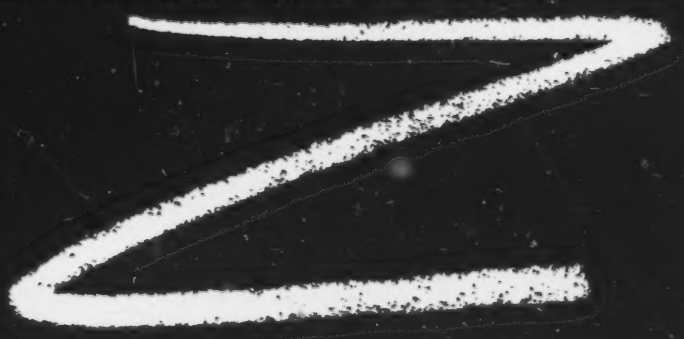


part of whatever the U.S is all about," Mr. Sosa says.

"The folks that are in power are less apprehensive here," he says. "It is a feeling that 'I want to work within the system.' Here they become part of the structure, and that is unique to [San Antonio]."

Part of that probably has to do with the stability of the market. Nearly two out of three Hispanic heads of households have lived in the area for more than 10 years. About half of the Hispanic population speaks both English and Spanish at home, but 28% prefer Spanish compared with a 60% Spanish-language preference in Los Angeles.

This does not mean the San Antonio Hispanic is really an Anglo in disguise, says Lloyd Lopez, marketing director of Mira/Hispanos, a research subsidiary of locally based Communications Advertising. "The reality is that there are several different profiles within this community," he says. "Contrary to studies by Yankelovich, Skelly & White, we are not homogeneous."

Mr. Lopez has segmented the San Antonio Hispanic market to try to prove that statement. The Primary Hispanic, he says, makes up 28% of the South Texas Hispanic population. The Primaries speak only Spanish, have 54% larger families than their non-Hispanic counterparts, lack a formal education, are strongly Catholic and earn about $14,000 to $16,000 a year, accounting for $1.3 billion aggregate income, he says.

Primary Hispanics tend to rely on a national brand because of the strength of the name, Mr. Lopez says. It is the best for the family, or at least the best they can afford.

On the other end of the spectrum, according to Mr. Lopez, is the Assimilator Hispanic. Only 12% of the local Mexican-American population, this group represents more than $2 billion in aggregate income. The members of this segment are well educated and professionally employed. A large percentage is younger than 40 years old and is the fastest growing group of Hispanics in the country.

Between the two ends of the spectrum is the 60% of the marketplace that most confuses the experts. The Participator Hispanic is usually second and third-generation and follows one of two paths: Intra-acculturation, staying within the Hispanic culture, or inter-acculturation, moving toward the Anglo community. Together they represent about $3.7 billion in income.

Which path they take, Mr. Lopez says, depends on the parents' experience with the Anglo community. If that experience is good, the influence will be to meld the two cultures, to "be an Amercan" and still retain the strong Hispanic heritage. The result is shrinking households, more suburban living, more striving for education and income—and more use of English.

The intracultural direction is just the opposite. The parents' experience with Anglos was bad, but consumer, family and society patterns still are changing.

"If I am one of this group," Mr. Lopez says, "my cultural comfort zone must extend beyond the west side or the south side. It must extend to a north side job. I start to lose control of my family, because they are trying to retain the imperatives of the past completely. It is not possible to do this and still succeed in the work place."

The result, he says, is a new, younger generation of Hispanics. This subculture's combination language, Spanglish, represents the idea that this group's members are neither truly Mexican nor Anglo, but a hybrid.

Some of those mixtures can be seen in more moderate success stories. Mayor Henry Cisneros—37, Harvard-educated, White House fellow, university professor—is the first Hispanic mayor in the Alamo City in more than 100 years. He reached that post by being attractive to both elements of the community.

"Henry is the first Hispanic politician who is able to walk the line between the north side power structure and keeping the west side and south side groups happy," says Carlos Montemayor, president, Montemayor y Asociados. "That is a credit to Henry as an individual."

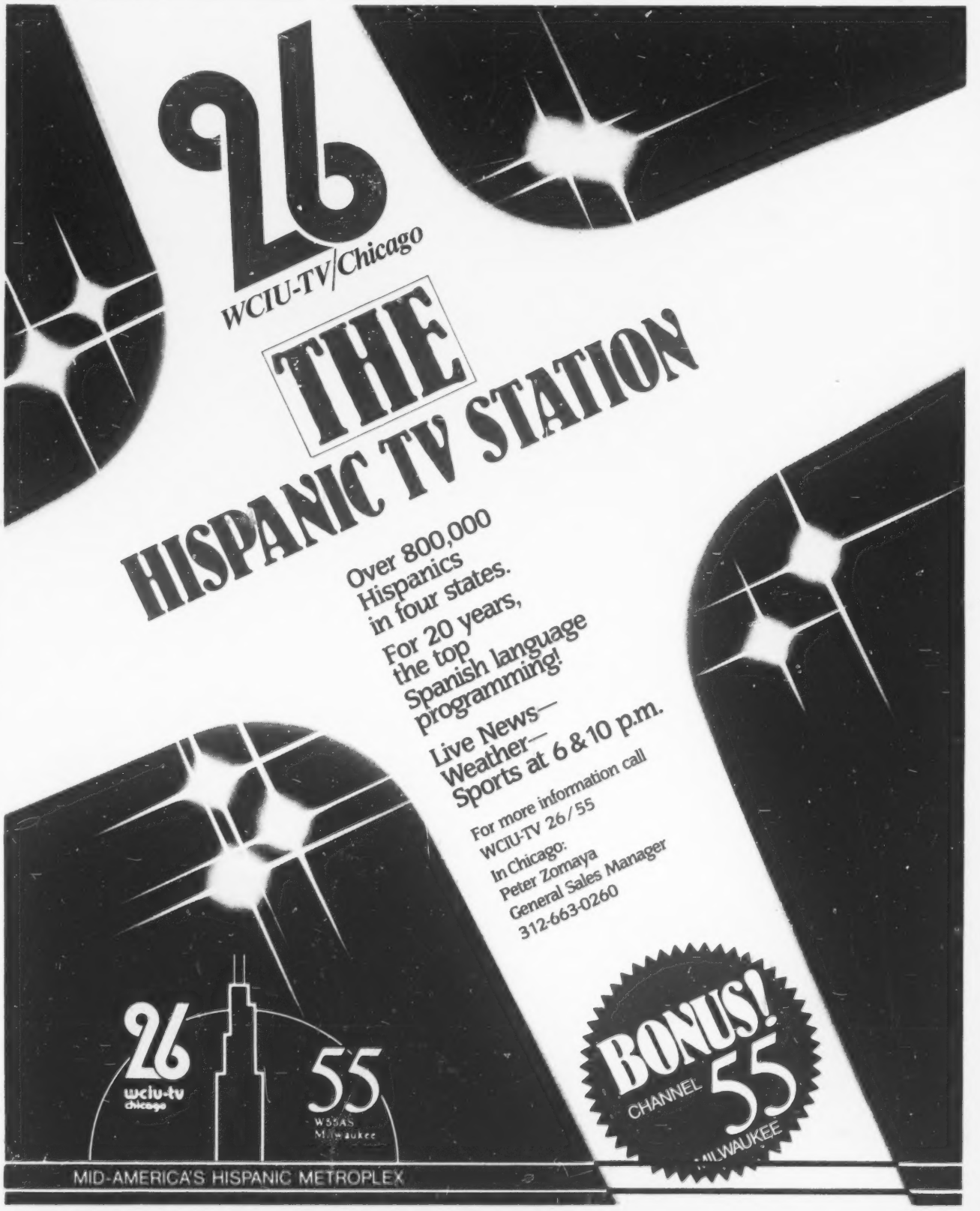
While San Antonio has traditionally been a nonpartisan city for local politicians, Mr. Cisneros broke that custom by supporting Walter Mondale. He was even among the handful of finalists in the Democratic vice-presidential contest. Some suggest that his local support—he won his last election with 94% of the vote—comes from deep Democratic roots. Mr. Sosa, whose agency produced Spanish-language spots for the Republicans in last year's national elections, disputes this.

"The majority are Democratic, but 40% of the Hispanic vote in the last presidential election went for Reagan. Four years ago, that was 31%; eight years ago, the Republican vote was 8%, and 12 years ago, it was 4%. There's an interesting phenomenon going on here. Hispanics are basically conservative by nature, they seem to want to be Republicans as soon as they go up the economic ladder. They are anti-welfare, for the home and neighborhood, for defense and anti-abortion."

As can be seen by changing voting patterns, changing consumer choices, new life-style choices, San Antonio is evolving.

"For all of these years, we have been in the backseat," Mr. Lopez says. "Now you can see we have arrived; we are emerging.

"Migration trends of San Antonio's west side are moving north, into the typically Anglo communities. The new commercial development there, including new housing and retail malls, is a catalyst for a whole new universe that has sprouted out there, just like Henry Cisneros is a new catalyst for another type of universe," he says. "There is a new group of people who are saying 'I can be like Henry.' Look at those catalysts. That is what we've been lacking for years."



Chicago

(Continued from Page 15)

than twice the official tally; some estimate as high as 1.4 million people. Having increased 16% from 1980 to 1985, according to Strategy Research, Hispanics constitute the city's fastest growing population segment.

This trend is not likely to slow soon. Today, Hispanics account for about 15% of the city population. Yet 24% of Chicago children younger than 5 are Hispanic.

"Hispanics are now a part of what makes Chicago Chicago," says Enrique Loza, president of Americas Inc., a local ad agency.

Marketers have a few main reasons to look at Chicago. First is the market's size. Second is its mirror of the U.S. Hispanic population, "making it a perfect test market for national products," says Mary Montgomery, editor, Extra Bilingual Publications Group. "Because of the community's composition, you'll find out here first if something can work on a national level."

Perhaps most interesting, though, is the emergence of the Hispanic consciousness—the consciously Hispanic-Hispanic. "It was the Anglo market that labeled us Hispanic," says Jose Nino, president, Latin-American Chamber of Commerce. "We certainly didn't put on an advertising campaign for it."

Consequently, "in many places you say 'Hispanic' to Spanish-speaking people and they look at you with a puzzled face. There are a lot of Mexican-Americans, Puerto Ricans, Cubans and so forth, but there are very few who truly feel their primary identity is Hispanic," says Armando Triana, director-special research and academic programs, DePaul University.

Even so, Chicago is where "the concept of 'Hispanicness' reaches its highest levels," the Cuban-born management expert says.

This is because on the city's north side something new is bubbling up from the cultural caldron. More than half of the city's 526,000 Hispanics live on the north side, Mr. Triana says. "The north side is unique in relation to Hispanics worldwide. Nowhere else do so many Hispanics of so many different nationalities use goods and services in such close proximity."

The north side is Chicago's Hispanic melting pot. "The southeast side is primarily Mexican," says Mila Tellez, publisher, Extra Bilingual Publications Group. But because of the loss of steel industry jobs in that area, many Mexicans have moved closer to employment, which happened to be to some Puerto Rican areas. In addition, "as they become upwardly mobile, they seem to be moving to the north and west sides of town, as well as the suburbs." But even Hispanic suburbanites return to the old neighborhood to do their shopping, she says.

Growing community awareness also has been a reaction to the realities of Chicago politics. "The Hispanic elite has no choice but to work together across nationality lines. We simply are not enough individually to make a difference," Mr. Triana says.

As people in cultural transition, he says, Hispanics need an identity, and Hispanic-ness provides the most flexible socially acceptable framework. A rise in Hispanic consciousness typically is accompanied by a marked reduction of cultural bias against other Spanish-speaking nationalities.

"My father from Puerto Rico could not get along with Mexicans," says Miguel Del Valle, executive director, Association

Three major communities converge in Windy City

In Chicago the issue of to target or not to target specific Hispanic audiences takes on national significance because of the convergence of three major —Mexican, Puerto Rican and Cuban—and several other distinct Hispanic communities.

The message here is clear: Go generic. Of course, nothing is that simple. You have to remember that what's right for a campaign depends as much on the product and company as it does on the audience.

For some products it may be better to target Mexican-Americans, who make up about 60% of both the Chicago and U.S. Hispanic markets. For life style products or ad messages, it might be best to segment the Hispanic audience by regions, using the dominant nationality characteristics.

Or if budgets are tight, it might be wiser to skip Hispanic-oriented ads, hoping the 41% to 57% of Hispanics who describe themselves as fluent in English will be swept into a general market campaign.

Still, for a campaign that wants to reach all Spanish speakers with the same ad message, the favored method in the Windy City is to work with ethnically neutral images in a media mix that includes tv, radio, print, outdoor and even circulars.

Paul Sierra, creative director at Chicago's O.M.A.R., recommends this approach for several reasons, not the least of which is that tv alone "is too expensive to target to a single audience."

It's not cost-effective to target all the nationalities, says Enrique Loza, president of Americas Inc. The solution is to use a range of media and promotional events and Spanish that everyone will understand—"Walter Cronkite Spanish," he says.

Illinois Bell, with nearly 15 years of advertising to Hispanics under its belt, has had considerable opportunity to weigh the various ad stratagems. Assistant vp Fredric J. Felton has concluded that universally accepted Spanish is the best policy. "We have found that if you stick to the traditional classic Spanish you may come off as a little prim, but at least you are understood," he says.

George San Jose, president of San Jose Associates, doesn't care for the word "generic." He says it sounds too much like "mediocre." But he does agree with the concept of aiming for the largest possible audience rather than running ethnically oriented material in the various outlets favored by specific nationalities.

Mr. Sierra likes the idea that universally accepted spots are aiding in creation of a distinct American Hispanic nationality. It's not only good business," he says, "it's the right thing to do."

The ad message should stress "a theme that will unite all of us," Mr. Loza says. "That's the best way to invest advertising money wisely."

A Mexican factory worker and a Mexican architect are as different—or even more different —from each other as a Mexican and a Puerto Rican factory worker, says Jorge Caballero, president of Caballero & Associates. "Unless it's a specific case," he says, "I go for the life styles, not the nationalities." Yet he too agrees that to create one commercial for each ethnic group is making it too complicated.

Chicago agency executives agree that there is no single best way to spend dollars allocated for Hispanic advertising. Everybody likes tv, but they also say radio, print and outdoor are effective. Mr. Loza says Hispanics even will take the time to read door-to-door circulars.

"There is no rule," Mr. Caballero says. "It depends on the product, and the end product probably should be a mix."

Mr. San Jose says he looks at the media mix as a jigsaw puzzle with "seven or eight pieces that have to be put together in new configurations each time." In short, many Hispanic agency executives in Chicago agree that you can't rely on one medium and that the smartest way to go fishing is to cast the widest net.

A group of local Spanish-language newspaper publishers has realized that if the net is to be cast wider, they should be a bigger fish. Calling themselves the Hispanic Publications of Chicago, the publishers of *El Manana Daily*, Extra Bilingual Publications Group and *La Raza* discovered that between their formats —daily news, weekly community affairs and weekly features—and circulation areas, they weren't competitors.

In addition to commissioning independent research on the Chicago Hispanic market, the group's goal "is to take a professional approach to improving our effectiveness, discussing and verifying the numbers and selling the permanence of print," says Steve Hopkins, assistant publisher, *La Raza*.

"They're networking—doing what the Anglos have been doing for years," says Rosanna Stoll, president, Metrica Marketing Group, a research company.

As the message and the media become more sophisticated, the members of Chicago's Hispanic potpourri—whether they assimilate and acculturate to each other or the mainstream public —should become easier to talk to and easier to find. —*J.H.*

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House, an 85-year-old community settlement house on the predominantly Hispanic near-northwest side. "My wife is Mexican. Her father hated Puerto Ricans."

His wife and her three sisters married Puerto Ricans, Mr. Del Valle says, "because we grew up in the same neighborhood. To me it didn't matter that she was Mexican," he says, noting his eldest son calls himself a Latino.

The attitude of Mr. Del Valle's son reveals one of the screwballs thrown at marketers by U.S. Hispanics. Not only must the market be considered horizontally—by nationality—but also vertically—by generation. The number of generations in the U.S. is as important in shaping the psychographic portrait as national origins.

"In 1970 there were 160,000 Hispanics here under 20," Mr. Triana says. "Most of those kids now have their own families, and most of them went through school here, meaning that for the most part they are English-dominant. They speak Spanish, but are likely to feel more comfortable in English for long conversations." This English-dominant group will increase in number and purchasing power faster than all the Spanish-dominant groups will increase through immigration, he says.

"In eight to ten years you're going to have equal numbers of Spanish-dominant and English-dominant Hispanics," Mr. Triana says. "The English-dominants will sit at a substantially higher socioeconomic level than the Spanish-dominants. They will be better educated, and they will tend to work in white-collar jobs and have incomes around the U.S. median."

Despite the trend toward crossculturalization, "you shouldn't confuse the melting pot with the mosaic," says Gorki Tellez, publisher, *El Manana Daily*. "If you were to mix everything together you'd have nothing left in the pot except something that tastes awful. This is a unique group—the subcultures are keeping their identities."

Although unity and respect among the groups is at its highest point, he says, the stores in the predominantly Mexican Little Village neighborhood carry Mexican goods, while in Humboldt Park the shops carry Puerto Rican products.

The roots of those preferences are deep. "We came to this country brainwashed," he says. Rosanna Stoll, president of Metrica Marketing Group, a locally based research company, says, "Hispanics come to this country with brand preferences developed at their country of origin."

As the number of second and third generation Hispanic-Hispanics increases, however, advertising in the U.S. will take on greater importance. "The first time I saw a McDonald's commercial in Spanish on Chicago tv, I got really excited," Mr. Del Valle says. "It was reaching out to us, telling me, 'I know you're out there. You're an important enough part of the society for me to be advertising to you.'"

Similarly, the recent commercial success of the singing group Menudo serves notice that the young Hispanic market is barely containing its urge to explode in every direction. The trick, of course, is how to explode with it.

According to Mr. Triana, the Yankelovich, Skelly & White survey "Spanish USA, 1984" was contradictory. "On one side, Yankelovich showed that Hispanics are more likely than the general population to be brand loyal. On the other hand, it also showed that Hispanics indicated a greater likelihood of trying new products, new stores, new things."

He says this indicates "Hispanics are initially more volatile, then later more loyal to particular products. That is, until brand loyalty is established, they are more likely to try new things." The conclusion, Mr. Triana says, is that it makes sense to develop that loyalty early.

One thing that makes the Hispanic market different from the mainstream market is that advertising alone is not enough to establish wide and deep brand loyalty. To be effective, "advertising must be supplemented by

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Chicago

(Continued from Page 37)
a vigorous program of promotional special events that put the product or service into the community through human representatives," Mr. Loza says. "This is an important point because it speaks directly to the fundamental Hispanic need to develop trust toward particular products and services." He often recommends companies participate directly in community events.

Illinois Bell has considerable expertise in penetrating the Chicago Hispanic market. "We were early among Chicago business to recognize the potential in this market place and just the plain size of the demographic equation," assistant vp Fredric J. Felton says.

The reasoning was simple, he says. "It was a marketing effort that says, 'When you've lost a customer, replace him.' " Older ethnic groups were moving out of the city, and Hispanics were moving in. Illinois Bell wanted their business.

"In 1970 we entered into a constructive dialog with two dozen or more community leaders," Mr. Felton says. "Our interest was in sales. Theirs was in jobs and the two translated perfectly because we needed people who understood the marketplace. It was important for us to add Hispanics to our payroll.

There is really no trick to winning the Hispanic marketing wars. "Once you win a Hispanic's heart, you've got him," Mr. Del Valle says. "And it really doesn't take all that much to win their hearts—just simply showing concern for Hispanic advancement."

Those two words sum up the fundamental concern of Chicago's distinct nationality groups and its growing population of Hispanic-Americans. Hispanic advancement is a uniting theme, and it is very likely to become a rallying cry for the growing number of second and third generation Hispanic-Hispanics—even as they make the transition to more mainstream consumer spending patterns.

All of which seems to indicate Chicago is destined to play a major part in the future of the national American Hispanic market; sort of an "as Chicago goes, so goes the nation."

According to Mr. Loza, the good news for those who want to audition for the role of Hispanic Chicago's suitor is that "You don't have to create elaborate, expensive spots to be successful. You don't even need to wear a *sombrero* or poncho to be welcome. Just come in genuinely."

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Bay Area

(Continued from Page 15)
per capita incomes among such markets and one predicted to include greater economic growth.

Covering 11 counties and ranked sixth in the nation in Hispanic population with 717,200, according to Strategy Research Corp., Miami, the San Francisco area of dominant influence does not have a centralized Hispanic community.

The greatest influence on the Hispanic market personality of the San Francisco Bay Area is the influx in the past five years of Central and South American political and economic refugees, attracted by the mild climate and economic and cultural opportunities.

The Mission District is nestled in the narrow warm belt of San Francisco. Ten years ago, it existed like an island, a little chunk of Mexico located only a 12-hour drive from Baja, Cal. But the ethnic composition of this neighborhood has been reworked.

Many small "Mexitessens" are located along Mission St., the main drag of the district. Most are small, family-owned shops supplying the ingredients for many Mexican specialties: Fresh corn husks for tamales, handmade tortillas and Mexican-style sausages. But now the aisles include banana leaves for Nicaraguan-style tamales and beans for a popular El Salvadoran dish.

In barely five years, much of the Mexican population has left San Franciso and been replaced by Central and South American refugees, the professional people who made up the middle class of Nicaragua, El Salvador, Chile, and other politically hot nations.

"Certainly there are also 'economic' refugees," says Emilio Nicolas Jr., vp-general manager, KDTV, San Francisco, a SIN International Network affiliate. "But to a large extent, the refugees that settled in the Mission felt politically threatened by their economic status, education or political affiliation."

Because Spanish was the day-to-day language of the Mission, it was natural for the immigrants to settle in this neighborhood of pleasant weather, Spanish-language newsstands and theaters.

"San Francisco really has been the brain drain of Central America," Mr. Nicolas says. "It was the educated and politically involved people that had to flee." Many others came as well, he says, although this key group will have the greatest effect on income and buying. Mr. Nicolas also predicts per capita income will increase steadily during the next five years as this group becomes proficient enough in English to pursue their professions.

"It does appear that the Central and South Americans coming into this area are making it their home," he says. "They don't see much chance of returning to their native countries in the near future." Their children—born and raised in the U.S.—will add to this Hispanic market. They will be very American, but they will have strong cultural ties to their parents' homeland.

Carlos has been in the U.S. for almost 20 years, a Chilean political refugee who brought his young wife here to start a new life. His sons, Manuel, 13, and Juan, 17, were born in the U.S. and have never been to their parents' homeland.

Every year, the Chilean community gathers for a soccer game, dance and barbecue. The gathering was a family treat when the boys were younger. But during the past few years, it has become a family relations land mine. Embarrassed about the gathering's "hick" appearance, Juan began to balk at having to attend the ethnic affair.

He attended the celebration grudgingly when he was 15, but refused to go the next year. His father says he resented the "put down" of the family roots. Juan says he just wanted to be the same as his friends at school.

When he was 17, Juan went to the celebration. He met some girls and chummed around with some boys his age. He says he is looking forward to the party next year.

Carlos is still resentful that his son's life does not have a more Chilean focus, but Juan has become one of the emerging class of Hispanics. Juan is very Americanized in his buying tastes and habits. But he has a sense of pride in his heritage. For him, Spanish provides the connection to his parents and his Hispanic peers.

"The Bay Area is a perfect example of what the Hispanic market is," says Eduardo Gregg Patoni, president, Inter-American Advertising. "The nationalities included in 'Hispanic' are many: Mexican, Nicaraguan, Salvadoran, Argentine. There are some cultural differences, but they're really pretty minor compared to the common language that ties them together as a single market."

Bay Area Hispanic advertising and media executives say using Spanish makes any advertising work in the Hispanic market. It is the great common denominator, even in this diverse market.

Mirella-Olivia is 2 weeks old. Her mother, Janet, is an Anglo and her father, Lionel, is a Mexican who arrived in San Francisco about 10 years ago. They've been married for five years and Mirella-Olivia is their first child.

Lionel spoke virtually no English when he arrived in the U.S., but he has worked hard to learn it and has a responsible position at a flower nursery in the East Bay community of San Pablo. Janet, a native of the Bay Area, has a well-paying job as a postal worker.

Their friends are both Hispanic and Anglo, but Spanish is spoken at home. Janet and Lionel discussed speaking in English so Lionel would develop a better command of the language, but decided his English is adequate and using Spanish was more relaxing.

When Janet returns to work in three months, they have decided to send Mirella-Olivia to a day-care center that has Spanish as the primary language. They say their Hispanic friends' children who learn English first tend to be withdrawn and shy about using Spanish. But the children who learn Spanish first seem to pick up English quickly from tv, friends and family. Mirella-Olivia will grow and develop as an Hispanic; not Mexican, but not Anglo.

The largest concentration of Bay Area Hispanics—260,300 people, according to Strategy Research—is in Santa Clara County, the heart of Silicon Valley. Mexicans coming across the border 10 years ago would have headed to the region for harvesting jobs. As the computer industry boomed, agricultural jobs became factory jobs manufacturing silicon chips and computer casings.

The ethic to acquire land is part of the Mexican-American culture because the people of the land—farmers, field workers and those from small villages—were the ones who had come to seek their fortune in the U.S., according to Mr. Patoni. "The people who had money in Mexico have stayed," he says. "The Mexicans who came to the United States were looking for a better life and willing to work hard to get it."

Buying a house, acquiring major appliances, nice furniture and other accoutrements of U.S. middle-class living are some of the primary goals of these new Americans, he says.

"Latins are very status conscious in expressing the 'big' and the 'marvelous,' " he says. "They have a saying, '*Solo Dio y los Gringos*,' which means only God and the Gringos have it. They're looking for some of the good stuff in life. That's why you'll find they almost always buy name brands and consider discount products inferior."

Jose—an example of Mr. Patoni's analysis—crossed the border five years ago as a 17-year-old undocumented alien from a poor family in a small town in the state of Michoacan, Mexico. He and a friend crossed the border at night, a grand adventure. They had dreams of working the harvests and getting enough money to buy a car, taking it back to show the other boys in their hometown.

Jose had relatives in the San Francisco area, so when he crossed into the U.S., he called them and they sent money to make his way to the Bay Area. In the five years since that phone call, he's changed from a naive country boy, who had to

Lynn Berling-Manuel is an Oakland, Cal.-based frequent contributor to Special Report and editor of Soccer America.

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be taught to use silverware instead of scooping up food with a tortilla, to a married man with a steady job and two children.

Jose and his wife purchased a small home with some financial help from relatives, and Jose sends money back to his family in Mexico. He has become a legal citizen since marrying his Chicano wife and plans on staying in the U.S. His children will grow up in a very Mexican-oriented home, but they will go to American schools and will grow up as young Americans.

Although San Francisco is ranked sixth in total Hispanic population, it is ranked fifth in the number of households. According to the San Francisco Business Council, annual family income in the San Francisco Hispanic market is $23,400—$5,600 more than the U.S. Hispanic average and $2,100 less than the U.S. average.

"Because often both the husband and wife work and children also may be contributing to household income there tends to be more financial stability in the household economy," Mr. Patoni says.

Like most of the other major Hispanic markets, the San Francisco population is young—68.5% are younger than 35, 36.5% are younger than 18 and 25% are 11 years or younger. "Money is really spent on kids for clothes and toys," KDTV's Mr. Nicolas says. "They want the best for their kids because life often revolves around home and family."

However, according to Tony Salazar, senior account exec for KOFY-AM in Santa Clara, changes are occurring. "We're seeing an increase in the number of women heads of households," he says. "Although the Catholic church still is a very strong influence on the entire Latin culture, it does not have as strong a hold on the community. The divorce rate may not have increased drastically, but it seems to be an increasing trend."

As cultural changes occur, cultural clashes are inevitable. Within the past decade, Mexican-Americans have taken greater pride in their roots and developed an identity as Chicanos. But this is an identity newer immigrants don't always understand or appreciate.

Miguel, a young Chicano lawyer who grew up in the San Francisco Bay Area and is practicing in Bakersfield, is caught between the cultures. His mother was politically active, and Miguel's dream always had been to be a lawyer.

He now works with low-income Hispanics as clients, but his Spanish is almost nonexistent. It has made it difficult to help them and gain their trust.

"You had to feel sorry for the Mexican-Americans," Mr. Patoni says. "They weren't really accepted by Anglos or Mexicans. For a long time they just wanted to fit in. But one of the important things that has happened is that now it's okay to be Chicano.

"Latins are a very proud people," he says. "That is deep in the culture . . . ."

The San Francisco Hispanic market is a puzzle—an apparently lucrative puzzle. Its diversity and geography tend to make marketers wary. But it also is establishing itself as potentially one of the most profitable Hispanic markets.

The next five years, according to local experts, should see substantial growth. As political problems in Central and South America continue, refugees will flow across the borders to friends and relatives. With them will come greater acquisitions, making the San Francisco Hispanic market a puzzle worth solving. AA

Houston

(Continued from Page 15)

lented investigator. The figures run from a low of 300,000 Hispanics to a high of nearly 1 million.

Strategy Research Corp., Miami, places the population of the Houston area of dominant influence at 3.5 million, of which 611,300 are Hispanic. The company says 464,800 Hispanics live in Harris County alone. Arturo Sanchez, director-pr and promotions for KLAT-AM, the No. 1 rated local Hispanic radio station, says all figures are soft because of the number of undocumented Hispanics.

Regardless of the total figures, Houston Hispanics have gone far beyond the barrios, says Richard Jaffe, president of Telesurveys of Texas, Houston. "The barrio image is a false image here in Houston."

Telesurveys of Texas surveyed Houston's Mexican and Mexican-American population, which Mr. Jaffe says makes up 90% of the local Hispanic market. "Eighty per cent of the census tracts here are at least 5% Hispanic. Hispanics are in black areas and white areas. An insulated or isolated society, it is not," he says.

The result of this mingling, according to Rosie Zamora-Cope, vp of Telesurveys of Texas, has been greater integration in school systems and more intermarriage—30% of Houston Hispanics have married non-Hispanics. "So there is more acculturation," she says. "But you also have new arrivals all the time," so Houston has both old and new world Hispanics.

"Formerly all-white areas now have Hispanic shops in them," she says. "Apartment complexes that had been all-white, high-income buildings now have a lot of brown faces."

Mr. Jaffe says that "emotionally Anglos find it easier to absorb Hispanics into their society than blacks. There's no history of violence the way there is with blacks from the '60s. Also the culture is so inculcated—Anglos have always gone to Mexican restaurants." The only real concern whites have is that the number of Hispanics in the school system will cause a serious tax drain, he says.

Tacho Mindiola, a University of Houston professor, says the

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The leading Spanish language daily newspaper in the U.S.

Houston

(Continued from Page 39)
influx of Mexican immigrants gives residents a sense of vitality.

Mr. Jaffe says that without the undocumented, Houston would be poorer. "The undocumented have stimulated new jobs and industries. Despite an influx of immigrants, our unemployment figure is down one percentage point from last year to 7.4%. The undocumented and documented are able to enter the labor force rather effectively. They are also creating a middle class among Mexican-Americans and blacks," he says. The undocumented come in at the bottom of the employment ladder, pushing others up.

Although a portion of Houston's undocumented community has left because of the city's oil-related downturn, the city's proximity to the Mexican border makes it an attractive destination for Mexicans and an increasingly large number of Central and South Americans.

El Salvadoran residents now number between 30,000 and 50,000, Mr. Sanchez says. A small community of Cubans, estimated at 10,000 to 20,000 people, and another community of 12,000 Central and South Americans, fill out the local Hispanic population, he says.

The Cuban immigrants and some South Americans tend to work in white-collar jobs. "The Mexicans coming up are blue collar," Mr. Jaffe says, "and the Salvadorans are a mixed bag depending on who they're fleeing —the left or the right."

Because the Salvadorans, Guatemalans and Colombians are "more divorced from their lands," these people are adopting the Mexican-American culture, he says.

Mr. Jaffe says economic and social problems guarantee growth even if stricter immigration restrictions were approved. Already one out of every three students in the Houston public schools is Hispanic. Within 10 years the majority of the students will be Hispanic, and Mr. Jaffe says half of Harris County will be Hispanic in 30 to 35 years.

"The fertility rate among Mexican-Americans is much higher than among whites or blacks," Mr. Jaffe says. "Children are a survival mechanism: If you have kids, they'll support you. Until they become middle class, Hispanics are going to keep having children."

The Houston Hispanic community is an attractive market because of the age of the population, Mr. Mindiola says. More than 40% of the Houston Hispanic community is younger than 18 while 73.5% is younger than 35.

Local Hispanics' income and educational levels are higher than local blacks', but they are lower than that of Anglos. More than 40% of Houston area Hispanic heads of households are high school graduates, while 20% are college graduates. Strategy Research placed the 1980 average annual family income at $13,500. A smaller study done by Mr. Mindiola in 1982 found the average to be only slightly higher.

Although Strategy Research found that two-thirds of Houston Hispanic households have at least one credit card, Mr. Jaffe says only 35% of the Hispanic-Americans have checking accounts—a sharp contrast with the 90% of the total community. Only 6% of the undocumented have checking accounts, he says.

"With half the population being undocumented or registered-documented, they are always worried about what is going to happen," Mr. Jaffe says. The undocumented live "at the whim of the government," he says, making them unlikely to open checking or savings accounts and providing a healthy money order business.

But even the documented and Hispanic-Americans have not been reached by the financial services institutions. They are still strong believers in the cash transaction, he says. Houston Hispanic leaders say the lack of a relationship with the financial community is a detriment to increasing economic clout both as consumers and in business.

But lack of financial savvy has not kept 75% of the area's Hispanic families from owning their homes. One reason for the emphasis on home buying is the Hispanic's first priority—his family. The family orientation accounts for a lower divorce rate, fewer mental health problems and fewer problems with the law, Mr. Jaffe says.

Spanish is the bond between generations and Hispanic-Americans and new immigrants. ["Advertisers] have to understand that 44% of Houston Hispanics speak Spanish all of the time as a family language," Mr. Jaffe says. "Over 85% speak Spanish most or some of the time." This requires a new sophistication and adaptation to bilingualism, he says. "Businesses here are becoming more bilingual. The stores recognize there has to be a Hispanic flavor."

Fiesta Mart, a grocery store that opened several years ago in the heart of the city's north side barrio, found success hinged on promoting the Hispanic flavor. The store not only stocked nearly every item that Hispanics could ever want, it overstocked them. Store officials capitalized on the Hispanic trait of seeing abundant stock as an invitation to buy without fear of depleting the items for anyone else.

Politically, the Harris County Hispanic tends to be a Democrat but with a mixed stand on issues. On abortion, they are conservative, but on civil rights they are liberal, Mr. Mindiola says. He says the Republicans are making inroads into the upper and middle-class.

Hispanics believe they have no influence and that the political system is not responsive to their needs, says Mr. Mindiola, who conducted a political survey of a large Houston barrio. As a result, Hispanics are registered in smaller numbers than the community at large. Mr. Jaffe says that to vote in an American election would be to break their bond to Mexico.

Should they become registered, they would have increasing clout both as voters and buyers. But even if they remain undocumented, Hispanics will continue to shape the city in their image, adding Hispanic tiles to the city's cultural and economic mosaic.

Brownsville

(Continued from Page 16)
spite this, the people who inhabit what has been described as America's Third World survive on several cultural, economic and educational levels.

• **The Day Laborer:** A tv cameraman spotted an extreme case; two families seeking shelter from a winter freeze in a three-room shack with no heat, no water, one bare bulb suspended from the ceiling, swaying in the draft. The parents and eight children ranging in age from 2 to 10 years—with another on the way—stood without shoes or coats.

These new arrivals to the Hispanic Ellis Island probably will become low-paid day laborers, joining the 22% of the valley's population living at the poverty line or the 28% living below it, according to the Industrial Areas Foundation. These Spanish-speaking immigrants were victims of bureaucratic red tape. They don't qualify for food stamps because their papers aren't in order; a lawyer will straighten them out for $200.

The children don't speak English either, but they are of school age. The Supreme Court ruled they have to be admitted to school, but should they be taught in Spanish or the official language of their new country, a language they don't understand?

Immigrants continue to stream across the river primarily because conditions are worse in Mexico. Families such as these are the reason the valley's median age is 18, the average yearly income is $7,000 and educational levels are sixth grade, according to the South Texas Institute.

If this seems bleak, consider that the situation largely has improved: In 1970, the average annual income was $3,000 and the educational level was third grade. However, institute director Antonio Noe Zavaleta says the median age could dip to 16 years by 1990.

The day laborer's household and financial affairs usually are administered to by his wife. She will fill out the countless welfare forms, make the major purchases, raise the family and respond to efforts to organize the community.

Because of the day laborer's living conditions, the Catholic Diocese of Brownsville invited the IAF to try to organize this segment of the valley. "The only reason we're helping them is because no one else will—not the chamber of commerce, not the lawyers, not the developers," Bishop John Fitzpatrick says.

The day laborer spends nearly all his income on rent, food and clothing, usually at the neighborhood *tendajo* where credit is available. His favorite media is radio—music cheers him up and reminds him of home.

• **The Border Rat:** Julio grew up in the valley and will remain here until he dies. He is a border rat. He admits it. No, he proclaims it. Joe is one too, although he isn't quite as vocal about it.

Both completed Catholic high school and attended college. Every spring Joe tapes a 1040 tax form to his father's downtown office window and waits for the W-2s to walk in. It takes him about 15 minutes to complete a tax form while the customer waits. Presto, $10.

He won't keep it long, though; his children always need something. Joe blew his stack the other day when he found out his wife took their sons to the mall for haircuts at $12 each. His barber across the border in Matamoros charges 300 pesos, but he gives him $2 and let's him keep the change.

Joe considered moving to Houston with his brothers, but never got around to it. Although he is bilingual, his children don't speak Spanish and he hasn't bothered to teach them. "If they want to speak it," he says, "they'll learn it themselves."

Julio knows what it's like to be unemployed in the valley. The last time he got fired he went into his room and "didn't come out for a year," he says. His family supported him—they had to. They wanted him to be a po-

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liceman, but after he got out of the Marines he didn't want to wear another uniform.

His father went bankrupt when Mexican banks confiscated U.S. dollars in savings accounts. The sign above his father's junkyard was knocked down during the last hurricane and hasn't been replaced. His uncle owns a sister yard in Mexico, and his relatives are close to local politicians. "You need connections like those to do business," he says.

Julio's philosophy—"there's a racket in everything"—makes him a shrewd and wary buyer, serving him well in the poverty-stricken valley, where a large underground economy exists. He wears Topsiders and tasteful, expensive jewelry.

The border rats account for 10% of the population, according to South Texas Institute estimates, and represent the new middle-class valley Hispanic. Earning between $20,000 and $40,000 a year, they are as bright and capable as their Anglo counterparts, having been given access to about the same education. They feel stifled by one thing: Lack of advancement. "You're never going to get anywhere down here," Joe says.

Politically, they differ just slightly. Joe disdains national and statewide politicians, who trek here every four years promising change in return for votes. His interest in politics is purely parochial. Julio is more radical on national issues as they involve "Chicanos," saying the deck is stacked against them.

• **The Infrastructure:** Representing about 15% of the population, the members of the infrastructure have risen through the ranks to become the valley bureaucracy. Their families have lived in the area for generations. In this group are social program administrators, district judges, school superintendents, college professors and just plain hometown folks who made good.

Because they have become the establishment, they lead their lives and carry their views conservatively. This group is wealthier—annual incomes exceed $40,000, according to local estimates—older—about mid-40s—more mobile and more secure than other valley Hispanics. They like their community and love their position in it.

Their homes are furnished with "brand name" merchandise. They have outgrown scrimping, but still know how to drive a hard bargain.

• **The Executive Winter Texan:** Primarily Anglos, these people, 15% of the valley population, often consider themselves stranded in an outpost far from civilization.

Many are long-term tourists or retirees. Others are industry executives—bank presidents, real estate agents, promoters and developers—who find themselves stuck in the 19th century. They are working hard to raise the standards of living into the 20th century and have been the class that valley Hispanics hope to emulate.

At their worst, they keep relations with the natives cordial and to a mimimum, learning only enough Spanish to communicate with the maid. They often remind others English is the official language of the U.S.

Long dominant in local politics, their strength is waning because of increasing Hispanic voting strength. Brownsville was the first to fall and McAllen now is tottering.

• **The Wealthy Mexicans:** This low-profile group is part of the reason magic once visited the valley, and it still keeps the malls afloat. When the peso fell, the Wealthy Mexicans' presence fell with it, dropping from 30% of the local population to 5%. They found themselves unable to afford quality U.S. merchandise, beachfront condos and lavish shopping sprees, causing local merchants to shift their target to local residents.

They still can be found vacationing on South Padre Island or shopping downtown. Their main contribution to the economy is keeping financial houses teeming with deposits, protected by the Federal Savings & Loan Insurance Corp. Mexico confiscated their dollars once, and they are making sure it won't happen again.

• **The Founders:** Also primarily Anglos, this 5% of the area's population didn't discover the area, but figured out how to make more money out of it. After forming irrigation companies, they turned a silty desert wasteland into a year-round citrus and vegetable producer.

They oppose change for one obvious reason: They have the most to lose. Still the real powers of the area, their strength may be waning. The biggest threat to their position is worker's compensation and union organization. Also, many of the citrus groves were sold in 10-acre lots to northerners for investments. It's unclear who the real owners are now.

Their offspring are part of the new right, more compassionate than their parents but still conservative. Most keep low profiles and live in secluded upper valley areas. They once planted palm trees and tried to re-create a plantation life style—now the palm trees are all dead.

With the exception of radio, advertisers primarily reach this diverse market in English. To advertise in Spanish is to consciously target the 215,000 residents on the other side of the Rio Grande, they say.

KGBT-AM is the largest radio station in the valley and broadcasts in Spanish to an audience well into Mexico and Central America. KIWW, also Spanish language, is the fm leader.

The tv market is divided evenly between KRGV, the ABC affiliate, and KGBT, the CBS affiliate. Their Spanish programing—less than 5% of airtime—consists of Sunday morning musical guest shows. Because of its cost, cable tv—represented by K12TV—primarily serves the Valley's rather limited middle to upper income groups.

Freedom Newspapers hold a

(Continued on Page 42)

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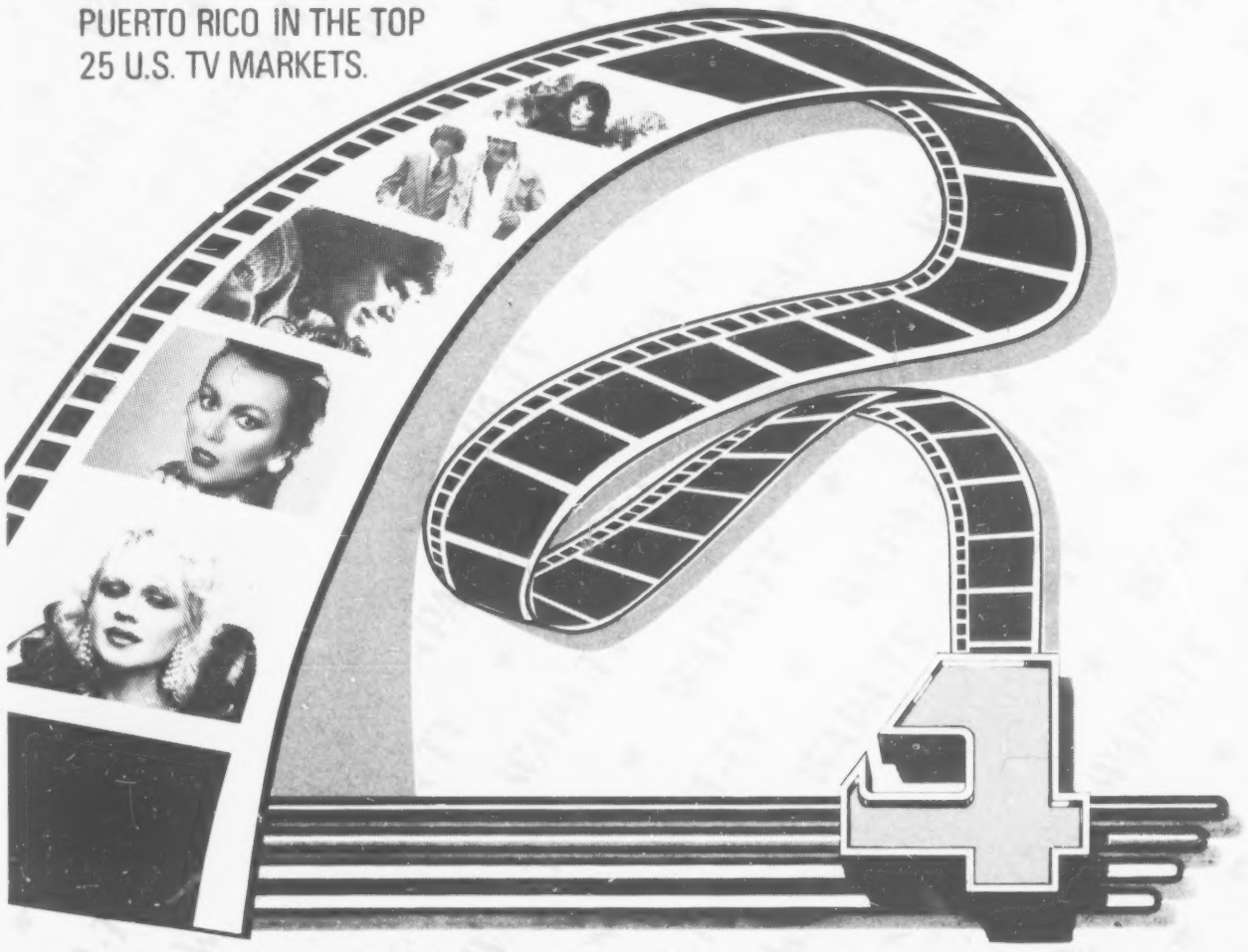

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Brownsville

(Continued from Page 41)
virtual monopoly in the print media, owning the *Brownsville Herald*, the Harlingen-based *Valley Morning Star* and the *Monitor* in McAllen. The *Herald* publishes a Spanish-language edition that has a dedicated following numbering 5,000, according to Douglas Hardie, publisher. But it is merely four Spanish pages wrapped around the rest of the English-language newspaper.

Advertisers are missing the boat if they think converting English commercials into Spanish will appeal to the border market, says Mr. Zavaleta of the South Texas Institute. "That's a researcher's copout, to lump all Hispanics as Spanish speakers," he says. "The Hispanic is much more diverse than that. The valley is truly a bilingual community, and research has shown succeeding generations rely on Spanish less and less.

"We're entering the middle class, exerting our political and economic muscle, and we have to be reached in ways that are consistent with our experiences and values," he says.

The themes that appeal to valley residents are those that acknowledge they are moving into society as full-fledged participants in social and economic activities. Judge Reynaldo G. Garza, the first Mexican-American appointed to the federal judiciary, says he will never forget what President John F. Kennedy said to him on the day of his appointment: "He said, 'America was no longer going to accept second-class citizens.'"

Judge Garza symbolizes just how much the immigrant can achieve if given the opportunity. If Hispanics continue to infiltrate the middle class, by their sheer numbers alone, mindful of their humble past but driven by a desire to succeed, maybe magic once again will visit the Rio Grande Valley.

Albuquerque

(Continued from Page 16)
are a part of Texas.'"

Mr. Ramsey says Spanish phrases that are relevant to the Cuban, Puerto Rican or Mexican populations in other cities may be meaningless in New Mexico. "It's a different language."

New Mexico politics reflect the long-established clout of the Hispanic population. The state has the largest proportion of Hispanic residents in the nation —36.8% Hispanic compared with Texas' 23.4% and California's 22.5%. In part because of this, it is the only state with a Hispanic governor, and it has sent two of the nine Hispanic representatives to the U.S. Congress. The State Legislature is 40% Hispanic. "The Anglo has no trouble voting for a Hispanic here," says Lee Benjamin, executive director of the Albuquerque Hispano Chamber.

Mr. Collado points out another ramification of the long-standing Hispanic culture: New Mexico Hispanics are more heterogeneous. "Here you have all types of people," he says. "Rich, middle class and poor."

Albuquerque's Hispanic market is even more youthful than the national norm, with 69% younger than 35 years old. The obvious conclusion is that their greatest earning and spending years are still ahead of them. Males 18 to 34 account for 58.4% of the population—compared with 16.6% nationwide—and Hispanic females 18 to 34 account for 60.5%—contrasted with 16% nationwide.

The regional Hispanic median income is $19,500, close to the non-Hispanic national norm. But a Hispano Chamber of Commerce survey found Hispanic household income in Albuquerque hovered near $14,700 a year—$5,000 less than the average non-Hispanic household.

According to the survey, a greater proportion of New Mexico Hispanics work in heavy industry and as operators and service providers. Non-Hispanics tend to work in finance and insurance and are found in managerial, professional and technical jobs.

The brand loyalty found nationally among Hispanics is also evident among New Mexican Hispanics. A survey by Hispanic Advertising Consultants found that 61.3% of auto buyers surveyed listed "make" as the reason for a purchase, and only 16% listed "price." Marketers should "stress quality and service," Mr. Ramsey says.

The local touch also works, Mr. Benjamin says, adding that "word-of-mouth, 'Tell-your-neighbors-about-us' advertising is very effective. There is a tremendous amount of trust in the Hispanic community. Even very large companies now are starting to work with local management. The national can decide the 'what' but the 'how' has to be local. To succeed here advertising needs a local angle."

The strong family ties that show up among Hispanics nationally are also obvious in New Mexico, with entertainment centered on the home and family. "Hospitality is a valued quality," Mr. Benjamin says, and leisure purchases reflect that.

New Mexicans cling to their unusualness, preferring New Mexican native foods, which are influenced by Indian cooking, over anything that might be described nationally as "Mexican" food. "In food at least, it's more difficult to make a change than in the community at large," Mr. Benjamin says. "It's brand loyalty, partly, and a resistance to changing food patterns."

But by appealing directly to the community, companies can influence and stimulate change. When a local distributor for a national concern hired a Hispanic community coordinator, someone who was well-known in the community, the company's sales boomed. A "Mexican" restaurant chain failed, and a local took it over, turning it into a success by serving local fare.

The composition of today's market will change soon, some experts predict. "There is a lot of intermarriage," Mr. Delgado says. "That will have an effect. Maybe not now, but in 10 years."

The immigration to areas of Albuquerque, unlike many primary Hispanic markets, is mainly Anglo, not Hispanic. Nevertheless, the Hispanic population of the city—which including outlying areas of Bernalillo County now accounts for 183,000 of New Mexico's 532,000 Hispanics—is expected to triple by 1990, according to "The Hispanic Almanac."

"It's an exciting market," Mr. Ramsey says. "National advertisers look at Albuquerque and say it's not a big enough market to do something special, but it is. The rate of growth will be 35% in the next 10 years. That means 104,000 more people, 60% of that growth in the Hispanic population."

Those growth figures and the fact that New Mexico is the only officially bilingual state in the union have boosted the acceptance of Spanish-language media, according to local media people. "The Hispanic market is almost integrated with the English. People who listen to our station are bilingual," says Richard Garcia, general manager of Spanish-language KDCE-AM. "Some families have been here for 390 years, and they are used to hearing both languages."

Although the area has a number of Spanish-language outlets, Mr. Delgado says it is not necessary to use Spanish to reach potential buyers.

A lot of Spanish is spoken, "but that doesn't mean it's all they speak," he says. "You do have to get in and be part of that culture, but that doesn't mean working in Spanish necessarily, just being part of things. Locally originated tv programs are only tokens."

But tokens may help position a company in the community. Local media people say Spanish-language ads run during English-language programing, or vice versa, have not resulted in cultural backlashes. "The nice thing about using Spanish-language radio," Mr. Ramsey says, "is there is a cultural tie. There's a crossover because Anglos are listening, too."

A telephone survey by Hispanic Advertising Consultants found that 21.3% of the Albuquerque residents who identified themselves as Hispanics spoke Spanish at home "all the time," and only 11.7% responded "never." The survey also determined that 26.3% of those people identifying themselves as Hispanics listen "often" to Spanish-language radio, and 26.3% "never" turn their dial to those stations.

Albuquerque marketers report that residents are placing more value on speaking Spanish as a second language. Although the current generation of 30-year-old Hispanics may not have learned Spanish because speaking English and assimilating was highly valued in their parents' generation, they are encouraging their children to learn Spanish.

Those active in the New Mexican Hispanic market say marketers should be attentive to the area's characteristics. "In a nutshell," Mr. Delgado says, "marketing understands the numbers, but from a cultural and psychological viewpoint they know very little.

"A lot of trying to reach the Hispanic market is being done through the eyes of an Anglo," he says. "The days of the Frito Bandito and the Mexican under a Saguaro cactus were over a long time ago."

Mr. Delgado says the best way for a company to reach the market is to become part of it at the grass-roots level.

Problems will exist until marketers recognize the different subcultural groups under the Hispanic umbrella, Mr. Delgado says. "There is a unique identity here . . . a huge hidden market that someone with the right assessment is going to explore. We're dealing with a distinct cultural group that yet is in the mainstream of society. I don't know that anyone really understands the Hispanic market. They bandy the Hispanic name around, but it's an umbrella name."

For those willing to probe its subtleties, the Albuquerque market is promising. "There is a feeling of growth in Albuquerque," Mr. Benjamin says, "a feeling of being part of the Sunbelt. I think the '80s is the decade of the Hispanic."

El Paso

(Continued from Page 16)
Juarez and the constant contact with two cultures is Spanish-language KAMA-AM and its affiliate, KAMZ-FM. Jack R. McVeigh Jr., national sales manager, says older Mexican-Americans in El Paso not only speak excellent Spanish, but also generally feel more comfortable with it. Spanglish is prevalent among younger Mexican-Americans, who feel more comfortable with English, he says.

Unlike KAMA, KAMZ is programed in English to reach the young Hispanic, Mr. McVeigh says. The average age of Hispanics in El Paso is 23.5 years. Strategy Research says 43.9% of all Hispanics in El Paso are younger than 18 and children younger than 12 make up nearly 30% of the Hispanic population.

The radio business in El Paso-Juarez is highly competitive, Mr. McVeigh says, with 17 stations in El Paso and 20 in Juarez.

"El Paso will always be a Spanish-English community. The comparative low circulation rates of the two English-language newspapers [*El Paso Times*, 60,500 daily; *El Paso Herald-Post*, 33,000 daily] attests to the language uniqueness of this community," Mr. McVeigh says.

Mr. Bencomo says El Paso-Juarez is different in ways besides language, differences that

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affect consumers' behavior and buying habits. "There is a great deal of pride among Hispanics in El Paso, of church and family. There is an ethic among Hispanics of being a good worker—that working hard is part of being a good provider," Mr. Bencomo says.

The good provider attitude means Hispanics are loyal to name brands, no matter how expensive, he says.

"Most of our customers are hard-working people," Mr. Bencomo says. "About 40% are receiving some kind of federal assistance, such as food stamps. But we also have very affluent Hispanics who grew up in the *barrio*, moved on to better things, but return to shop at the old store."

The future will see an upswing in the number of affluent El Paso Hispanics, he says. "Today we have many doctors, lawyers, judges, accountants. The Hispanic of today defies all stereotypes, even though we are still a blue-collar people and we have a long way to go."

Hispanics are able to take what they want from both cultures, Mr. Bencomo says. "More and more we're gaining the respect of the Anglo for our family ties, our music and food and our loyalty to the church," he says. "We're a beautiful people."

Politically, Mr. Bencomo says, the Hispanic is a mixture of Republican and Democrat, depending on economic status.

Those who live on a fixed income tend to remain loyal to the Democratic party, which is viewed as the party with compassion for the poor, Mr. Bencomo says. Underemployed and unemployed Hispanics feel left out of the American dream and are angry and frustrated, he says. "I would say 30% of our people are not making it. For them, being a Mexican and looking like a Mexican and speaking English with a Spanish accent is a terrible disadvantage."

When Hispanics are better educated and have better jobs, those characteristics become advantages. The Hispanic lawyer who relates to his clients because he is *raza* tends to do better than his non-Hispanic counterparts. Bilingual teachers are in greater demand than monolingual teachers.

"So political systems for the Hispanics means which party can get the Hispanics from the outside, where being Hispanic is a disadvantage, to the point in professional life where being Hispanic is a plus," Mr. Bencomo says.

Oscar Martinez, director of the Center for Inter-American and Border Studies at the University of Texas at El Paso, has a dim view of Hispanic progress. As a community, he says, El Paso Hispanics "have traveled only a short distance in their quest to achieve parity with the Anglo population. Economically and socially, a gulf still separates the two groups." But strides have been made, he says, and Hispanics have enhanced their role and their say in El Paso by fighting for their interests.

Residents of Juarez have none of the two-culture prejudicial problems of their friends north of the Rio Grande. Theirs is a problem of survival and of making it in a devaluating economy.

Many border businesses folded when Mexicans no longer could afford American products. The two cities again learned how much they rely on each other.

The peso today is still highly devalued, but because of high inflation in Mexico, Mexicans are finding bargains again in American border cities. Shoppers from El Paso and Juarez have crossed the border to spend some $125 million a year in each other's cities.

Not all the interaction has a positive effect, however. Labor experts say El Paso is a "minimum-wage town" because it is on the border.

Being on the border also promotes a feeling of isolation. El Paso is out of the normal orbit of Texas, relating in many ways to New Mexico, Arizona and California. "California has always been the mecca for Mexican-Americans," Mr. Bencomo says. "Very seldom would you hear of a Mexican-American moving to Dallas or Houston or Fort Worth. All that is changing now, and opportunities to the east are opening up. But the grass is still greener for us anywhere west."

Part of the Texas isolation comes from the fact that El Paso is only 325 miles from Santa Fe, the capital of New Mexico, while it is 583 miles to Austin, the capital of Texas.

Juarez is in the same boat. Mayor Francisco Barrio calls his city a desert island, and he says his constituents also are ignored, maligned and misunderstood by the rest of the country, including state and federal governments.

Because of the border, El Paso's economy is based on trade, government and low-skilled manufacturing, which has kept it from growing like other Sunbelt cities, says Thomas F. Lee, an El Paso economist. However, he predicts "a moderately healthy" economic future for the area.

Even if the economy doesn't boom, the population—fueled by high birth rates in both Juarez and El Paso and a steady influx of immigrants—probably will. City planners predict an increase from 470,000 to between 600,000 and 660,000 by 2000. In Juarez, planners estimate a population between 1.5 million and 2.4 million by 2000.

Economists, planners, businessmen and political leaders all agree on one aspect of the El Paso-Juarez economy of the future: The two cities and the citizens will continue to be Siamese twins, joined at the cash register.

Marketing to Hispanics report coordinator: Ed Fitch.

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